

Relationship Tracker User Manual:
V1.1

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Published:

23/08/2011

Table of Contents

1.0	Introduction	3
1.1	What is the Relationship Tracker?	3
1.2	Why does Health Exchange need it?	3
1.3	What Benefits can it Yield?	4
1.4	What's in the Relationship Tracker Manual?	4
2.0	How to Log on and Access the Relationship Tracker	5
3.0	User Controls and Navigating around the Relationship Tracker Interface	9
3.1	The Header Section	10
3.2	The Main Body Section	12
3.3	The Footer Section	15
4.0	Finding Records	16
4.1	Searching.....	16
4.1.1	Search Example 1	17
4.1.2	Search Example 2	19
4.2	Filtering Records	22
4.2.1	Filtering by Organisation.....	22
4.2.2	Filtering by Category and Organisation	25
4.2.3	Category Filter Example	27
5.0	Accessing and Creating Contacts	31
5.1	Accessing the Contact's in-depth View.....	32
5.1.1	Getting Back to the Main Record.....	36
5.2	Creating a New Contact	37
5.3	Amending Contact Details	41
5.3.1	Amendment Example	41
6.0	Accessing and Creating Communications.....	43
6.1	Accessing the Communication's in-depth View	45
7.0	Creating an Organisation Record.....	48
7.1	Record Creation Protocol.....	48
7.2	Record Creation Guide.....	49
7.3	Record Creation Example.....	49
8.0	Other Sections of the Relationship Tracker.....	54
8.1	Services	54
8.1.1	Service Example	55
8.1.2	Service Information.....	56
8.1.3	Entering Data for CDE, EEP and Events.....	57
8.1.4	Entering Data for all Other Services.....	59
8.2	Sites.....	61
8.2.1	Creating a New Site.....	62
8.2.2	Sites in-depth View	64
8.3	Attachments.....	65
	Glossary of Terms	66

1.0 Introduction

1.1 What is the Relationship Tracker?

Put simply, the Relationship Tracker is a place to store important information relating to external organisations which Health Exchange has contact with. It is like an electronic version of a rolodex card system that might have been used in the past to store information we want to be able to keep and refer to. External organisations can be establishments which Health Exchange provides services for, including GP surgeries, partner organisations we worked with such as Macmillan, and also enterprises which Health Exchange is looking to work with in the future.

Each organisation has an individual record on the Relationship Tracker. Within each record are areas to record and store:

- Business address and contact information
- Employee contact details
- Communications with employee contacts
- Service and referral information
- File attachments

1.2 Why does Health Exchange need it?

Previously Health Exchange had no single, centralised system for recording the important information we need to know about our relationships with external organisations. Different people who worked with the same organisation had their own individual records in notebooks, Word documents, spreadsheets, etc. Not everybody had the same information, some information varied from one source to another, and not everything was up to date. Put simply, we were unable to effectively share information across the organisation, and as a result sometimes we didn't know things we should have known.

As our organisation grows there will be a much greater number of organisations that we will work with in one way or another, and we will have more employees, and more services. In order to manage our external relationships effectively, we need a single place to store all information relevant to our external relationships, which is accessible and updated by everyone who needs to access it. That is what the Relationship Tracker will allow us to do.

1.3 What Benefits can it Yield?

Using the Relationship Tracker offers advantages to both individual staff members and Health Exchange. The main benefits are listed below:

- Staff members will be able to recall and rely upon information stored within the Relationship Tracker for use within their daily roles. For instance, if a Health Trainer wants to find a GP surgery address they could quickly find the relevant record and have that information within seconds.
- The Relationship Tracker is accessible via the Intranet using private login and password details. This means that office and remote workers will be able to access the system providing they have an Internet connection.
- Staff members will possess greater ability to share and feed back valuable information acquired within their daily roles. If a member of our front-line teams had a particularly interesting conversation with an employee of an external organisation, they'd be able to summarise what was discussed and make it available to other Health Exchange personnel who may also need to know.
- The Relationship Tracker will enable all employees to develop, contribute to and access a single, in-depth view of each external organisation.
- The Relationship Tracker will help us to develop better informed assessments of external organisations and their objectives. In turn, this will allow us to plan how we want to develop and manage our external relationships.
- Help users to manage and develop relationships more effectively, realising the opportunities available to Health Exchange itself.

1.4 What's in the Relationship Tracker Manual?

The Relationship Tracker user manual explains how to:

- Gain access to the system
- Handle the user controls
- Find your way around the Relationship Tracker interface
- Find and search for records
- Access, create and change contact and communications to organisation records
- Access and record information on additional areas including services and organisation site locations

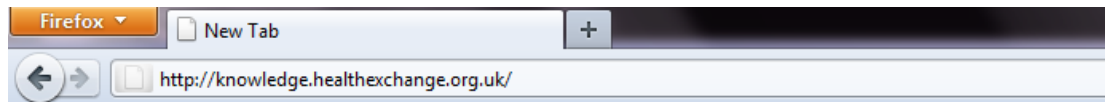
A glossary of terms is also listed at the end of this manual.

2.0 How to Log on and Access the Relationship Tracker

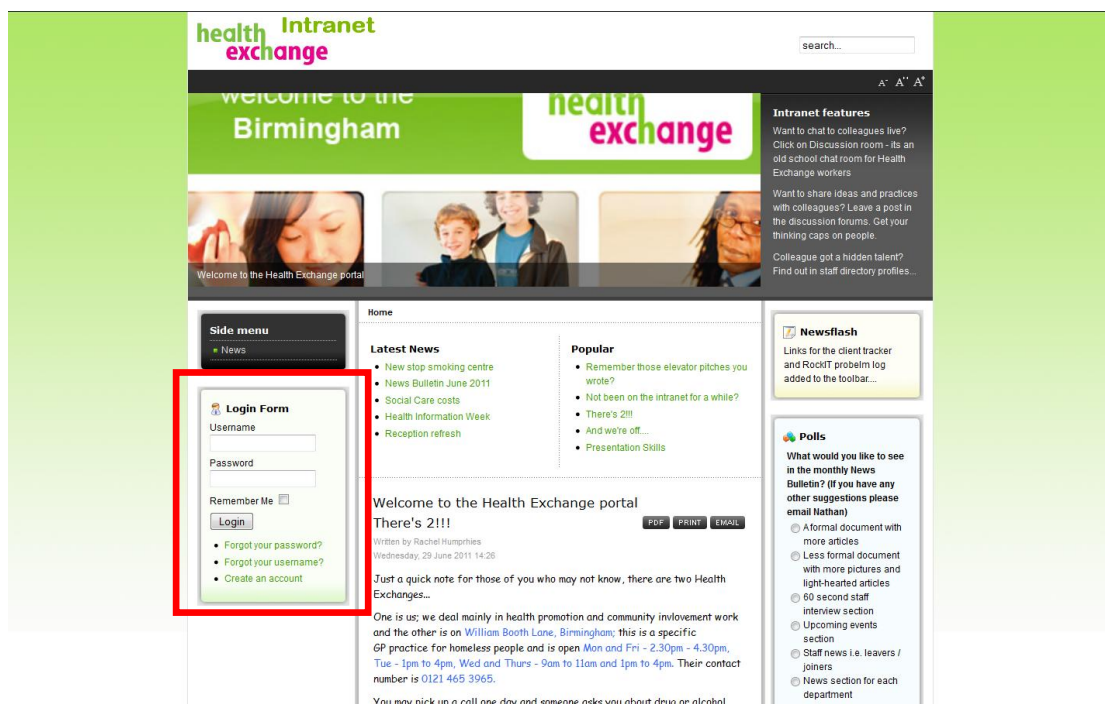
To access the Relationship Tracker, follow the step-by-step guide below.

1. The first step in accessing the Relationship Tracker is to open your web browser and enter the Health Exchange Intranet URL into the address bar found below:

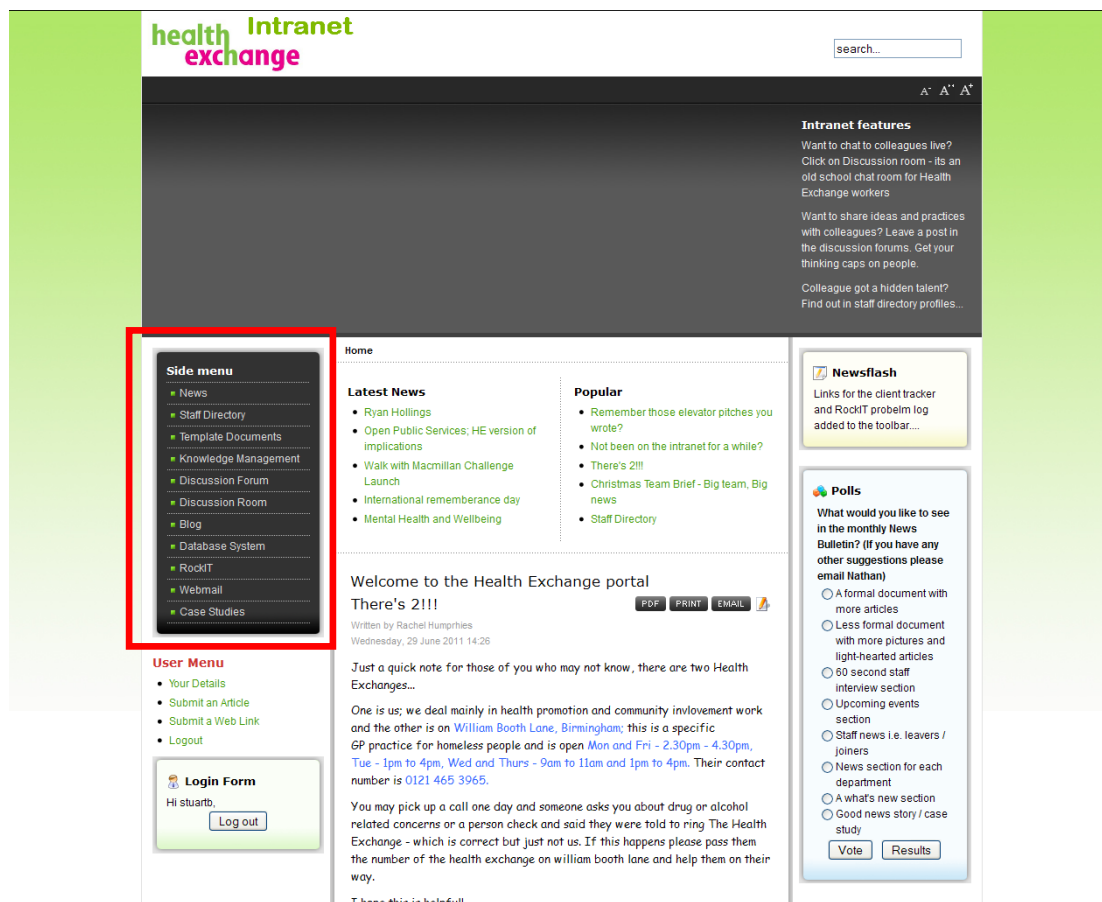
<http://knowledge.healthexchange.org.uk/>



2. You will now be presented with the Health Exchange Intranet site. Enter your Intranet Username and Password in the *Login Form* area on the left hand side of the page.



3. After successfully logging into the Intranet, you will be able to access the *Side Menu* panel on the left hand side of the page. From the list, left click on *Database System*.




4. You will now be presented with the *Health Exchange Database System* login page.



5. Left click on the blue *Login* hyperlink listed above. After doing so you will be prompted to enter your assigned Username and Password details.

6. After entering your login details, left click on the *Login* button in the centre of the page.



Health Exchange Database System

☐ Guest Account (not available)
☒ Account Name and Password




Username:

Password:






Unauthorised access is prohibited.

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7. The Health Exchange Database Systems page will now be accessible. From the buttons seen below, select *Relationship Tracker* to enter the database.



Browse





Layout:


Main Menu

View as:

Form



Record: 



Found Set: 2691 

Total Records: 2691

Unsorted

Main Menu

Logged on as: admin




Health Exchange Database systems

Please select the database you require

Support Plus (HE Client Database)	Inventory Tracker (Test)
bWell	Relationship Tracker
CDE	Breastfeeding (Test)
Walks	Staff Activity Tracker (Test)
Quality of Life	
GP Questionnaire	
Manage GP Practices	
User Management	
Location Management	

Version 3.2 - June 2011



8. You will now be presented with the Relationship Tracker's main page.

Logged on as: stuartb

Relationship Tracker

health exchange

ABC Community Group

Select Category: Go

Select Organisation: Go

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation:

Address Line 1:

Address Line 2:

City:

County:

Post Code:

Tel / Fax:

Website:

Twitter:

Facebook:

Other Social:

Relationship Development

Business Nature:

Category:

Relationship Status:

Relationship Type:

- ☐ Commissioner
- ☐ Potential Commissioner
- ☐ Competitor
- ☒ Reach Partner
- ☒ Community Site
- ☐ Service Partner
- ☐ Influencer
- ☐ Strategic
- ☐ Funder

Primary Owner:

Secondary Owner:

Contact Freq. (Days):

Last Recorded Contact:

Contacts Communications Services Sites Attachments [Activate Portal](#)

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccomm	079010101010	0121 000 0000	Established	Recommen ...

Date Created: Date Modified: User Created: User Modified:

New Record Delete Record

health exchange

3.0 User Controls and Navigating around the Relationship Tracker Interface

Below is a view of the Relationship Tracker's main page view in its entirety. To help staff members understand the features within the Relationship Tracker, the Relationship Tracker's main page will be discussed in three separate sections:

- Header (the top part of the page)
- Main Body (the middle section)
- Footer (the bottom section)

The screenshot shows the Relationship Tracker interface. A red bracket on the right side of the page groups the top green banner and the top navigation area as the **Header**. An orange bracket groups the central form area, including the 'Primary Organisation Contact Details' and 'Relationship Development' sections, as the **Main Body**. A yellow bracket at the bottom groups the status bar, including 'Date Created', 'Date Modified', 'User Created', 'User Modified', and the 'New Record'/'Delete Record' buttons, as the **Footer**.

Header: Logged on as: stuartb, health exchange logo, Relationship Tracker title.

Main Body:

ABC Community Group

Select Category: [X] [Go] Select Organisation: [X] [Go]

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook: [Facebook icon]

Other Social: [Other Social icon]

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:

☐ Commissioner ☐ Potential Commissioner

☐ Competitor ☒ Reach Partner

☒ Community Site ☐ Service Partner

☐ Influencer ☐ Strategic

☐ Funder

Primary Owner: Stuart Brown

Secondary Owner: [Empty field]

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments Activate Portal

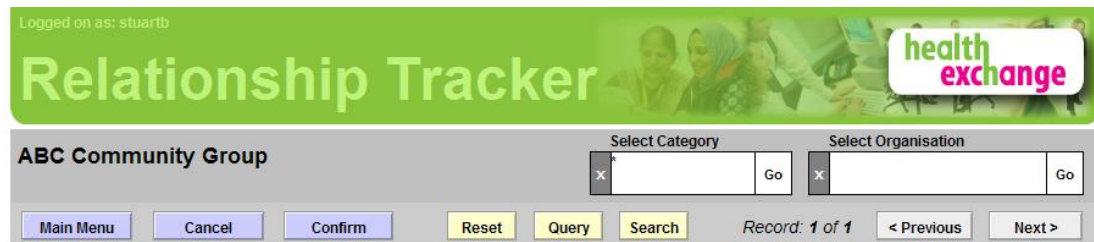
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen

Date Created: Mon 25/7/11 9:27 Date Modified: Wed 3/8/11 14:11 User Created: admin User Modified: stuartb

New Record Delete Record

3.1 The Header Section

For ease of use, record titles and user controls have been positioned at the top of the page.



Header Title

At the top of the page, one can see a header title named *Relationship Tracker*. This denotes that the user is on the Relationship Tracker database's main record page.

Organisation Title

Immediately below the *Relationship Tracker* header title on the left hand side, *ABC Community Group* can be seen in bold black text. This is the name of the organisation record and informs the user of the record they are currently viewing.

Drop-down Menus

To the right hand side are two drop-down menus used to navigate and cycle through organisation records on the Relationship Tracker.

The first drop-down menu¹ is titled *Select Category*. This field² allows users to filter all of the organisations by the type of category which the organisation is listed as. For example, if *Charity* is selected, only charity organisations will be available.

The second drop-down menu is titled *Select Organisation*. This drop-down menu displays the organisation records within the Relationship Tracker. One can left click on the drop-down menu, scroll up and down the list and highlight the particular organisation record they wish to view. The action is completed by pressing the *Go* button immediately right of the drop-down menu.

Blue Control Buttons

Below this section is an area with a light grey background. A set of blue buttons can be seen, with the first one titled *Main Menu*. Left clicking this button will bring the user to the main page of the Health Exchange Database Systems (*see the previous section titled "How to log on and access the Relationship Tracker".*)

The blue *Cancel* and *Confirm* buttons allow users to save or clear changes they have made to the record. For example, if a user wishes to change the telephone number

¹ A drop-down menu is an area which allows users to select values or categories from a prescribed list.

² Fields are sections within the database which store and display information. Some are accessible to users, whereas others are locked.

on the main record, they would press the *Confirm* button to save the change made. However, if a user does not wish to save a change they have made, they would press the *Cancel* button to undo their amendment.

Yellow Find Buttons

The yellow buttons named *Reset*, *Query* and *Search* are related to finding records within the Relationship Tracker. Their use will be explained further in **chapter 4.0**.

Record Selection Text

Right of the yellow buttons is a text line which informs the user of the record number currently being viewed, as well as the total number of records. For example, if the user was displaying record 16 and there were 90 records in total, the text would state *Record: 16 of 90*. This is useful when searching for records and is explained further in **chapter 4.0**.

Next and Previous Buttons

To the right of the record selection text are two pale grey buttons named *Previous* and *Next*. These buttons allow the user to simply navigate forwards and backwards from one record to the next.

3.2 The Main Body Section

The main body of the Relationship Tracker’s main page is where important information is stored on the organisation record.

Primary Organisation Contact Details

Organisation

ABC Community Group

Address Line 1

10 Example lane

Address Line 2

Erdington

City

Birmingham

County

West Midlands

Post Code

B23 5EX

Tel / Fax

0121 000 0000

0121 000 0000

Website

www.abccommunity.co.uk

Twitter

@abccommunity

Facebook

Other Social

Relationship Development

Business Nature

ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category

Other

Relationship Status

Established

Relationship Type

☐ Commissioner

☐ Potential Commissioner

☐ Competitor

☒ Reach Partner

☒ Community Site

☐ Service Partner

☐ Influencer

☐ Strategic

☐ Funder

Primary Owner

Stuart Brown

Secondary Owner

Contact Freq. (Days)

90

Last Recorded Contact

25/07/2011 12:34:29

Contacts



Communications

Services

Sites

Attachments

Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccomm	079010101010	0121 000 0000	Established	Recommen...  

Primary Organisation Contact Details: Title

At the top of the main body is a bold black title named *Primary Organisation Contact Details*. This denotes that the fields below are used to store contact and address information.

Field Labels

Each field within the Relationship Tracker has been issued with a label. This is to help the user understand what the field is used for and what type of information should be entered. For example, the top field on the left hand side is labelled *Organisation*. By reading this description users will be able to tell that this field is where the organisation’s name is entered and stored.

Primary Organisation Contact Details: Fields

This section displays address and contact details relating to the organisation record's main site location. Moreover, fields for storing social media information such as Twitter and Facebook web addresses.

Activity Icons

On the right hand side of certain fields, small activity icons are visible. For example, the first field named *Organisation* has a "W" icon to the right hand side of it.

Left clicking this button will allow users to search for the organisation's Wikipedia page on the Internet³. Similarly, left clicking on the activity icon right of the *Post Code* field will bring users to a Google Maps page, displaying a map location of where the headquarters of the specific organisation is located⁴.

Relationship Development

To the right of the *Primary Organisation Contact Details* section is the *Relationship Development* area⁵. The fields within this section are used, at a glance, to describe the type, category, and status of the relationship between the organisation and Health Exchange itself. Primary Owner and Secondary Owner are fields which denote individual staff members who are in overall command of the organisational relationship. This means that they are the ones that have high level communications with this organisation, maintain the relationship and pursue development activities.

Tabbed Portals

Below the *Relationship Development* area one can see a section with white and grey rows. This section is called the tabbed portal and is used to display additional information related to the main record. For example, the portal area displays information relating to *Contacts*, *Communications*, *Services*, *Sites* and *Attachments*. Accessing tabbed portals will be discussed in later chapters.

³ N.B. If no page has been created on Wikipedia for the organisation, no information will be displayed.

⁴ N.B. to access such pages, the user must enable pop-up windows within their web browser for the Relationship Tracker web address.

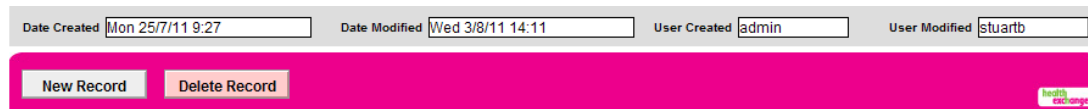
⁵ This area is primarily used by the Partner Relations team and the relationship owner to manage the relationship and inform users of key development factors.

Portal Activation Button

Just above the Tabbed Portal to the right hand side of the page is an orange button titled *Activate Portal*. When clicked, this button allows users to input information into the tabbed portal area. Once again, this feature will be discussed in later chapters.

3.3 The Footer Section

Below the main body section is the footer area at the bottom of the page⁶.



Date Created

At the left hand side of the footer section is a field named *Date Created*. This field informs the user as to when the record was created. A timestamp is used to display this information in day, date, and time format.

Date Modified

The next field to the right is named *Date Modified* field and informs the user when the record was last amended by an individual. Once again a timestamp is used to display this information in day, date, and time format.

User Created

The *User Created* field allows one to identify who within Health Exchange created the record currently being viewed. The creator's username will be displayed and hence follow Health Exchange naming conventions. For example, James Kay would be displayed as JamesK.

User Modified

The *User Modified* field allows one to identify the last individual within Health Exchange to amend the record being viewed.

New Record Button

Below the date and user fields is the *New Record* button on a cerise coloured background. The New Record button is used to create a new record for an organisation.

Delete Record Button⁷

Lastly, the *Delete Record* button is found, enabling one to remove the selected record from the database.

⁶ Information displayed within the footer fields is automatically generated and non-modifiable by users.

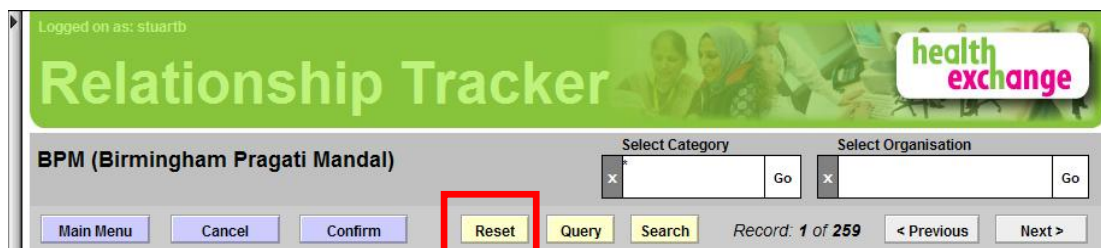
⁷ N.B. The *Delete Record* button will only be accessible to privileged users. This is to avoid the inherent risk of deleting records accidentally and also help manage the Relationship Tracker database in a controlled manner.

4.0 Finding Records

Being able to quickly find the record you wish to view is very important to the overall Relationship Tracker user experience. Recalling the record you wish to view can be performed by two primary methods which will be discussed below.

4.1 Searching

Record searches can be performed quickly within the Relationship Tracker by using the yellow buttons found in the header section.



1. To perform a search, one must first ensure that all records are selected. This can be performed by left clicking on the first yellow button the left titled *Reset*.

2. Press the yellow *Query* button to conduct a search. Doing so will put the Relationship Tracker into *Find Mode*. Entering *Find Mode* allows users to enter search information into the Relationship Tracker's fields on the main page.

Logged on as: stuartb

Relationship Tracker

health exchange

Select Category: [x] [Go] Select Organisation: [x] [Go]

Main Menu Cancel Confirm Reset **Query** Search < Previous Next >

Primary Organisation Contact Details

Organisation [W]
Address Line 1
Address Line 2
City
County
Post Code
Tel / Fax
Website
Twitter
Facebook
Other Social

Relationship Development

Business Nature
Category
Relationship Status
Relationship Type
☐ Commissioner ☐ Potential Commissioner
☐ Competitor ☐ Reach Partner
☐ Community Site ☐ Service Partner
☐ Influencer ☐ Strategic
☐ Funder
Primary Owner
Secondary Owner
Contact Freq. (Days)
Last Recorded Contact

Contacts Communications Services Sites Attachments **Activate Portal**

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	
[v]							[v]	[v]	[X]

4.1.1 Search Example 1

If a user wanted to find the *Birmingham Central Library* record, one could enter the word *Birmingham* into the *Organisation* field.

Logged on as: stuartb

Relationship Tracker

health exchange

Select Category: [x] [Go] Select Organisation: [x] [Go]

Main Menu Cancel Confirm Reset Query **Search** < Previous Next >

Primary Organisation Contact Details

Organisation **Birmingham** [W]
Address Line 1

Relationship Development

Business Nature

Left clicking on the yellow *Search* button now performs the search.

Looking at the *Record Selection Text* field seen above tells the user that the Relationship Tracker has found 15 records with *Birmingham* in the *Organisation* field. The first record found is called *BPM (Birmingham Pragati Mandal)* and can clearly be seen to have *Birmingham* within its title.



Logged on as: stuartb

Relationship Tracker

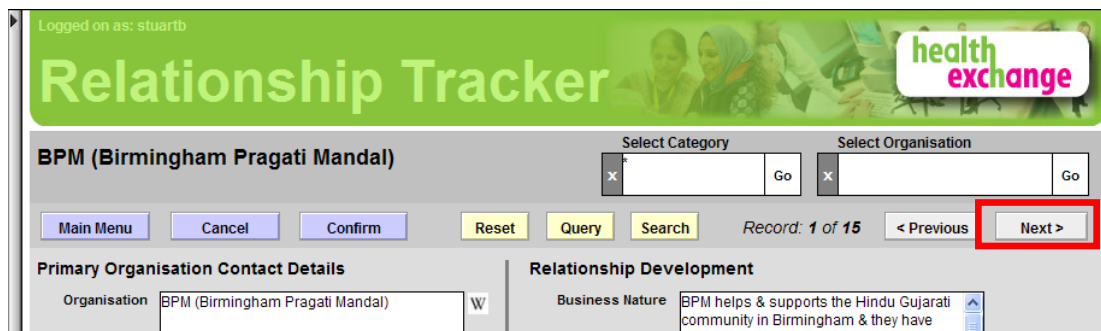
health exchange

BPM (Birmingham Pragati Mandal)

Select Category: [x] [Go] Select Organisation: [x] [Go]

Main Menu Cancel Confirm Reset Query Search **Record: 1 of 15** < Previous Next >

As we wish to view the *Birmingham Central Library* record, one can use the *Next* button on the right hand side of the header section to scroll to the next record.



Logged on as: stuartb

Relationship Tracker

health exchange

BPM (Birmingham Pragati Mandal)

Select Category: [x] [Go] Select Organisation: [x] [Go]

Main Menu Cancel Confirm Reset Query Search **Record: 1 of 15** < Previous **Next >**

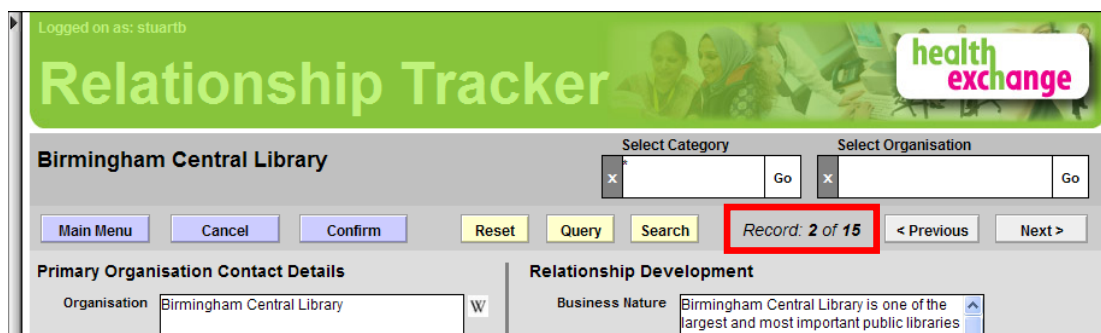
Primary Organisation Contact Details

Organisation: BPM (Birmingham Pragati Mandal) W

Relationship Development

Business Nature: BPM helps & supports the Hindu Gujarati community in Birmingham & they have [x] 2,500 members

As we can see below, the record now being viewed is for the *Birmingham Central Library*. Users may also wish to note that the *Record Selection Text* field has changed to *Record: 2 of 15* as we are now viewing the second record found within our search.



Logged on as: stuartb

Relationship Tracker

health exchange

Birmingham Central Library

Select Category: [x] [Go] Select Organisation: [x] [Go]

Main Menu Cancel Confirm Reset Query Search **Record: 2 of 15** < Previous Next >

Primary Organisation Contact Details

Organisation: Birmingham Central Library W

Relationship Development

Business Nature: Birmingham Central Library is one of the largest and most important public libraries in Europe

4.1.2 Search Example 2

Searches can also be performed using drop-down menus and checkbox set lists⁸. Let's conduct a search where the user wishes to find *Charity* organisations where the *Relationship Type* is *Reach Partner*.

Press the *Reset* button to make sure you are accessing all the records and then left click the *Query* button.

The screenshot shows the top section of the Relationship Tracker interface. At the top, it says "Logged on as: stuartb". Below this is a green banner with the text "Relationship Tracker" and a "health exchange" logo. Under the banner, there are two search fields: "Select Category" and "Select Organisation", each with a "Go" button. Below these fields are several buttons: "Main Menu", "Cancel", "Confirm", "Reset", "Query", and "Search". The "Reset" and "Query" buttons are highlighted with a red box. To the right of the buttons, it says "Record: 2 of 15" and "< Previous" and "Next >". Below the buttons, there are two sections: "Primary Organisation Contact Details" and "Relationship Development". The "Primary Organisation Contact Details" section has a text field for "Organisation" with "Birmingham Central Library" entered. The "Relationship Development" section has a text field for "Business Nature" with "Birmingham Central Library is one of the largest and most important public libraries in Europe" entered.

From the *Category* field, select *Charity* from the drop-down menu bar. This can be achieved by left clicking on the chevron arrow highlighted in red below.

The screenshot shows the same Relationship Tracker interface as the previous one, but with the search results displayed. The "Primary Organisation Contact Details" section now has multiple text fields for "Address Line 1", "Address Line 2", "City", "County", "Post Code", "Tel / Fax", "Website", and "Twitter". The "Relationship Development" section has a "Business Nature" text field, a "Category" dropdown menu, a "Relationship Status" dropdown menu, and a "Relationship Type" section with a list of checkboxes. The "Category" dropdown menu is highlighted with a red box, and the chevron arrow on its right side is also highlighted with a red box. The "Relationship Type" section has a list of checkboxes: "Commissioner", "Potential Commissioner", "Competitor", "Reach Partner", "Community Site", "Service Partner", "Influencer", "Strategic", and "Funder". The "Reach Partner" checkbox is checked.

⁸ Checkbox set lists are fields which allow the user to tick or leave blank. A ticked checkbox may indicate a certain selection. For example, ticking *Funder* checkbox set within the *Relationship Type* field would suggest that the organisation provides funding to Health Exchange.

Relationship Tracker User Manual: V1.1

A list of categories will then be displayed. Highlight and left click on *Charity* to make the selection.

The screenshot shows the 'Relationship Tracker' interface. At the top, it says 'Logged on as: stuartb'. The main header is 'Relationship Tracker' with the 'health exchange' logo. Below the header, there are two dropdown menus: 'Select Category' and 'Select Organisation', both with 'Go' buttons. A navigation bar contains buttons: 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', '< Previous', and 'Next >'. The interface is divided into two main sections: 'Primary Organisation Contact Details' and 'Relationship Development'. The 'Primary Organisation Contact Details' section includes fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The 'Relationship Development' section includes fields for Business Nature, Category, Relationship Status, Relationship Type, Primary Owner, Secondary Owner, Contact Freq. (Days), and Last Recorded Contact. The 'Relationship Status' dropdown is open, showing a list of categories: Academic Institution, Charity (highlighted), Children's Centre, Community Interest Company, Community Organisation, GP Surgery (BEN), GP Surgery (HoB), Housing Association, NHS Foundation Trust, NHS PCT, NHS PCT Cluster, Place of Worship, Private Sector, Public Sector, Radio Station, Social Enterprise, TV Station, Voluntary, and Other. A red box highlights the 'Charity' option. At the bottom right, there is an 'Activate Portal' button.

Now under *Relationship Type*, left click on *Reach Partner* from the Checkbox set list.

The screenshot shows the 'Relationship Tracker' interface with the 'Charity' category selected in the 'Relationship Status' dropdown. The 'Relationship Type' section is now active, showing a list of checkboxes: Commissioner, Competitor, Community Site, Influencer, Funder, Potential Commissioner, Reach Partner (checked), Service Partner, and Strategic. A red box highlights the 'Reach Partner' checkbox. The 'Primary Organisation Contact Details' section remains visible on the left.

Left click on the yellow *Search* button to execute your selection.

This screenshot shows the top section of the Relationship Tracker application. At the top left, it says "Logged on as: stuartb". The main header is "Relationship Tracker" in large green letters, with a "health exchange" logo on the right. Below the header, there are two search filters: "Select Category" and "Select Organisation", each with a text input field and a "Go" button. At the bottom of this section, there is a row of buttons: "Main Menu", "Cancel", "Confirm", "Reset", "Query", "Search" (highlighted with a red box), "< Previous", and "Next >".

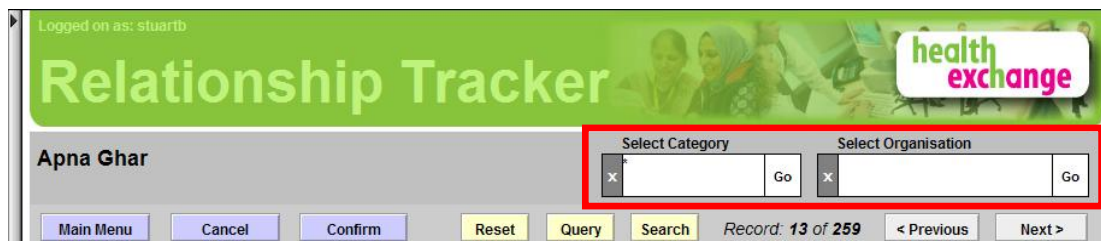
From the *Record Selection Text* one can see that this search has found 19 records. *Apna Ghar* is the first record on these 19 records and currently being viewed. The user can now scroll up and down the found records by using the *Previous* and *Next* buttons to access other charity organisations.

This screenshot shows the detailed view of the "Apna Ghar" record. The top section is titled "Apna Ghar" and includes the same search filters and buttons as the previous screenshot, with the "Search" button still highlighted. Below the header, there are two main sections: "Primary Organisation Contact Details" and "Relationship Development". The "Primary Organisation Contact Details" section contains fields for Organisation (Apna Ghar), Address Line 1 (21 Clevedon Road), Address Line 2 (Balsall Heath), City (Birmingham), County (West Midlands), Post Code (B12 9HD), Tel / Fax (0121 440 2266), Website, Twitter, Facebook, and Other Social. The "Relationship Development" section contains fields for Business Nature (Asian Elderly Day Centre provision, where they provide various activities from arts & crafts, health initiatives etc. They also provide a pick up & drop off service for their service users.), Category (Charity), Relationship Status, Relationship Type (Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, Funder), Primary Owner (Hasmita Parmar), Secondary Owner (Jaskirat Sidhu), Contact Freq. (Days), and Last Recorded Contact (30/06/2011 06:15:32). A red box highlights the "Record: 1 of 19" text and the "< Previous" and "Next >" buttons.

4.2 Filtering Records

Filtering records is another method of finding records within the Relationship Tracker. This method is significantly faster compared to searching for organisation records.

Filtering records is achieved by using the two drop-down menu fields at the top of the main page; those being *Select Category* and *Select Organisation*.



The screenshot shows the top section of the Relationship Tracker application. At the top left, it says "Logged on as: stuartb". The main header is green with the text "Relationship Tracker" in large white letters. To the right of the header is the "health exchange" logo. Below the header, there is a grey bar with the text "Apna Ghar". To the right of this bar are two search fields: "Select Category" and "Select Organisation". Each field has a small "x" icon on the left and a "Go" button on the right. Below these fields are several buttons: "Main Menu", "Cancel", "Confirm", "Reset", "Query", "Search", and "Record: 13 of 259". To the right of these buttons are two more buttons: "< Previous" and "Next >".

4.2.1 Filtering by Organisation

Users can perform a simple organisation filter by using the *Select Organisation* drop-down menu field only.

Left clicking on the white area of the *Select Organisation* field will activate the drop-down menu feature.



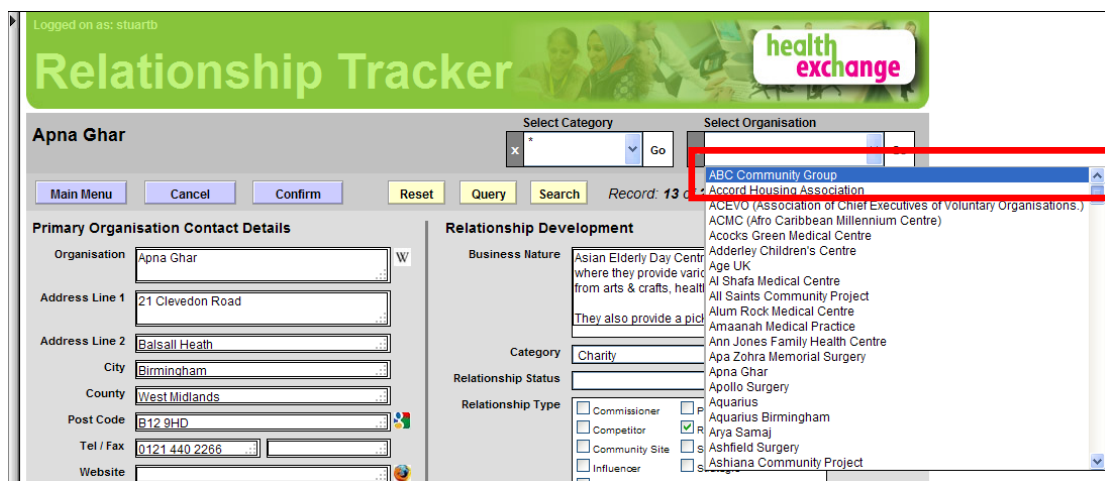
This screenshot is similar to the previous one, but it highlights the "Select Organisation" field with a red box. The field now shows a small blue downward arrow on the right side, indicating that the drop-down menu is active. The "Go" button is still present to the right of the field.

Left clicking on the drop-down menu chevron arrow allows the user to see all the organisation records currently within the Relationship Tracker.



The screenshot shows the top section of the Relationship Tracker interface. At the top, it says "Logged on as: stuartb". Below this is a green banner with the text "Relationship Tracker" and the "health exchange" logo. Under the banner, there is a grey bar with the text "Apna Ghar". To the right of this bar are two search fields: "Select Category" and "Select Organisation". The "Select Organisation" field has a dropdown arrow icon highlighted with a red box.

The organisation records are sorted alphabetically from A to Z. At the top of the drop-down menu we can see *ABC Community Group*. If we wished to view the *ABC Community Group* record, the user must highlight the record with the mouse cursor and left click on *ABC Community Group*.



This screenshot shows the Relationship Tracker interface with the "Select Organisation" dropdown menu open. The menu lists various organisations, with "ABC Community Group" highlighted at the top. A red box highlights the dropdown menu and the "Go" button to its right. The interface also shows a "Primary Organisation Contact Details" section on the left and a "Relationship Development" section on the right.

Left clicking on the *Go* button to the right hand side will then allow the user to view the *ABC Community Group* record.



This screenshot shows the Relationship Tracker interface with the "Select Organisation" dropdown menu closed. The "Go" button next to the "Select Organisation" field is highlighted with a red box. The "Select Organisation" field now displays "ABC Community Group".

The *ABC Community Group* record will now be visible to the user. Users may wish to note that the Record Selection Text has changed to *Record: 1 of 1*.

The screenshot shows the 'Relationship Tracker' interface with a green header bar containing the 'health exchange' logo. Below the header, the title 'Relationship Tracker' is displayed in large green letters. The main content area is divided into two columns. The left column, titled 'Primary Organisation Contact Details', contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook, and Other Social. The right column, titled 'Relationship Development', contains fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (Commissioner, Competitor, Community Site, Influencer, Funder, Potential Commissioner, Reach Partner, Service Partner, Strategic), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). At the top of the main content area, there are 'Select Category' and 'Select Organisation' dropdown menus, both with an 'X' button to the left. Below these are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', and 'Search'. The record selection text 'Record: 1 of 1' is displayed, along with '< Previous' and 'Next >' buttons.

When the user finishes with the record they can regain access to all of the records within the Relationship Tracker by simply pressing the X button right of the *Select Organisation* drop-down menu field.

This screenshot is identical to the previous one, but the 'X' button next to the 'Select Organisation' dropdown menu is highlighted with a red rectangle. The record selection text 'Record: 1 of 1' is still displayed.

This X button clears the record filter and allows users to access all of the records once more.

This screenshot shows the 'Relationship Tracker' interface after the filter has been cleared. The title 'Relationship Tracker' is still present. The main content area now shows the 'BPM (Birmingham Pragati Mandal)' record. The 'Select Category' and 'Select Organisation' dropdown menus are still present, but the 'X' button next to the 'Select Organisation' dropdown menu is no longer highlighted. The record selection text 'Record: 1 of 259' is displayed, and the '< Previous' and 'Next >' buttons are still present.

As seen above, all the records are now on show with the Record Selection Text changing to *Record: 1 of 259*.

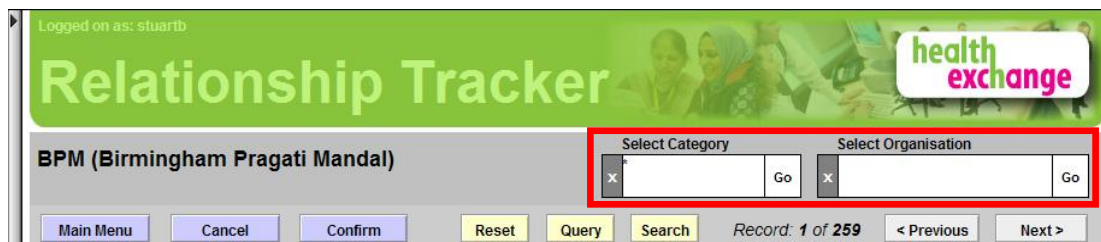
4.2.2 Filtering by Category and Organisation

Some users may wish to filter organisations by category when attempting to find a record. The benefit of using the category filter is that it can reduce the number of records a user has to scroll and search through.

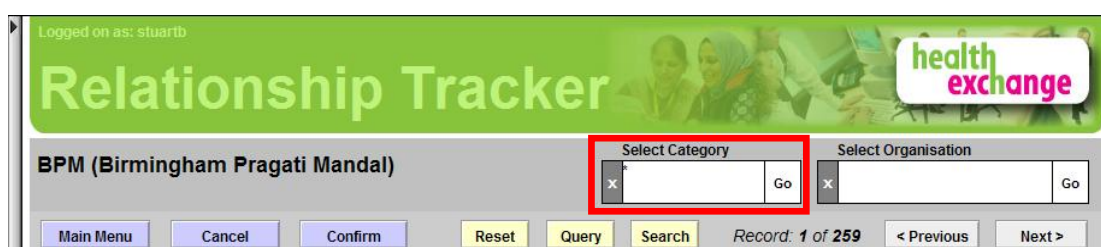
Before filtering the records by category, one must first ensure that all records are selected. Left clicking on the *Reset* button ensures all records are available.



N.B. Checking that all drop-down menu filters are clear is also important. If there's any text in the fields highlighted in red below, the user can simply left click on the corresponding X button to clear it⁹.



To filter records by category, the user must left click on the *Select Category* drop-down menu field.



⁹ Users may notice an asterisk (*) symbol in the *Select Category* field. This is perfectly normal and necessary to the functionality of the category filter.

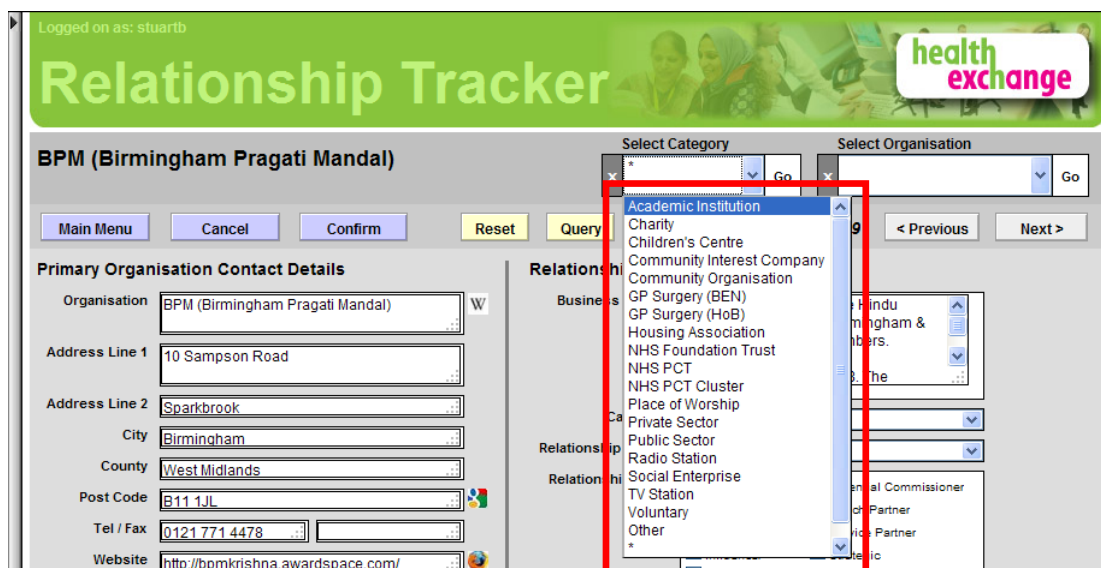
Relationship Tracker User Manual: V1.1

This will activate the drop-down menu and allow users to gain access to the categories. Users can now left click on the drop-down menu chevron arrow to perform this function.



The screenshot shows the top section of the Relationship Tracker application. The header includes the text "Logged on as: stuartb" and the "health exchange" logo. Below this is a green banner with the title "Relationship Tracker". The main content area is titled "BPM (Birmingham Pragati Mandal)". It features two search filters: "Select Category" and "Select Organisation". The "Select Category" dropdown menu is open, showing a list of categories. A red box highlights the dropdown arrow in the "Select Category" field. Below the search filters are buttons for "Main Menu", "Cancel", "Confirm", "Reset", "Query", and "Search". At the bottom, it shows "Record: 1 of 259" and navigation buttons "< Previous" and "Next >".

After doing so the categories will be presented for selection as seen below.



This screenshot shows the same Relationship Tracker interface, but with the "Select Category" dropdown menu expanded. The dropdown menu is highlighted with a red box and contains the following list of categories: Academic Institution, Charity, Children's Centre, Community Interest Company, Community Organisation, GP Surgery (BEN), GP Surgery (HoB), Housing Association, NHS Foundation Trust, NHS PCT, NHS PCT Cluster, Place of Worship, Private Sector, Public Sector, Radio Station, Social Enterprise, TV Station, Voluntary, and Other. The "Select Organisation" dropdown menu is also visible, showing a list of organisations. The "Primary Organisation Contact Details" section on the left includes fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, and Website. The "Relationship" section on the right includes fields for Business, Relationship, and Relationship Type.

4.2.3 Category Filter Example

As an example of how to use the category filter, imagine if we wanted to view the record for Macmillan. We know that Macmillan is under the category of *Charity*.

With the *Select Category* drop-down menu field open, the user must highlight *Charity* with their mouse cursor and then left click on it to select it.

The screenshot shows the 'Relationship Tracker' application interface. At the top, it says 'Logged on as: stuartb'. The main header is 'Relationship Tracker' with a 'health exchange' logo. Below this, the user is logged in as 'BPM (Birmingham Pragati Mandal)'. There are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', and 'Query'. The 'Primary Organisation Contact Details' section includes fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, and Website. The 'Select Category' dropdown menu is open, showing a list of categories: Academic Institution, Charity, Children's Centre, Community Interest Company, Community Organisation, GP Surgery (BEN), GP Surgery (HoB), Housing Association, NHS Foundation Trust, NHS PCT, NHS PCT Cluster, Place of Worship, Private Sector, Public Sector, Radio Station, Social Enterprise, TV Station, Voluntary, and Other. The 'Charity' option is highlighted. The 'Select Organisation' dropdown menu is also open, showing a list of organisations: Hindu, Birmingham & Partners, The, and others. The 'Go' button is highlighted.

Pressing the *Go* button will then confirm the category selection.

The screenshot shows the 'Relationship Tracker' application interface. The 'Select Category' dropdown menu is now closed, and 'Charity' is selected. The 'Go' button is highlighted. The 'Record: 1 of 259' text is displayed. The 'Search' button is also visible.

As seen from below, the Record Selection Text is displaying *Record: 1 of 34*. This means that there's 34 organisation records categorised by *Charity* and the user is viewing the first record.

The screenshot shows the 'Relationship Tracker' application interface. The 'Record: 1 of 34' text is highlighted. The 'Search' button is also visible.

Relationship Tracker User Manual: V1.1

Now that the records have been filtered by the *Charity* category, we can now turn our attention to the organisation records. The first step is to left click within the *Select Organisation* drop-down menu field.

The screenshot shows the 'Relationship Tracker' interface. At the top, it says 'Logged on as: stuartb'. Below this is a green banner with the 'health exchange' logo. The main header area contains 'Apna Ghar' and two dropdown menus: 'Select Category' (set to 'Charity') and 'Select Organisation' (empty). A red box highlights the 'Select Organisation' dropdown. Below the dropdowns are buttons: 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', and 'Search'. At the bottom, it says 'Record: 1 of 34' and has '< Previous' and 'Next >' buttons.

Doing so will activate the field. Left clicking on the drop-down menu chevron arrow will then allow the user to display the organisation records under *Charity*.

This screenshot is similar to the previous one, but the 'Select Organisation' dropdown menu is now activated, showing a small blue chevron arrow pointing down. A red box highlights this chevron arrow.

As seen below, organisation records categorised by *Charity* are now presented within the drop-down menu.

This screenshot shows the 'Select Organisation' dropdown menu open, displaying a list of organisation records categorized by 'Charity'. The list includes: ACEVO (Association of Chief Executives of Voluntary Organisations.), ACMC (Afro Caribbean Millennium Centre), Age UK, All Saints Community Project, Apna Ghar, Aquarius, Anja Samaj, Ashiana Community Project, Bham Chinese Community Centre, BID Services, Birmingham Cancer Network, Birmingham Citizens Advice Bureau, Birmingham Mind, British Heart Foundation, British Red Cross, Cancer Research UK, Chinese Society, Council of Black Led Churches, Diabetes UK, and Digbeth Trust. A red box highlights the entire dropdown menu.

Relationship Tracker User Manual: V1.1

In this example, we wish to access the Macmillan record. All of the records within the drop-down menu are listed in alphabetical order from A to Z. Users can control the scroll bar to navigate down the drop-down menu list and find Macmillan.

The screenshot shows the 'Relationship Tracker' application interface. The user is logged in as 'stuartb'. The main header is green with the 'health exchange' logo. Below the header, there's a section for 'Apna Ghar' with a 'Select Category' dropdown set to 'Charity' and a 'Select Organisation' dropdown. The 'Select Organisation' dropdown is open, showing a list of organizations in alphabetical order. The list includes: ACEVO (Association of Chief Executives of Voluntary Organisations), ACMC (Afr Caribbean Millennium Centre), Age UK, All Saints Community Project, Apna Ghar, Aquarius, Anya Samaj, Ashiana Community Project, Bham Chinese Community Centre, BID Services, Birmingham Cancer Network, Birmingham Citizens Advice Bureau, Birmingham Mind, British Heart Foundation, British Red Cross, Cancer Research UK, Chinese Society, Council of Black Led Churches, Diabetes UK, Digbeth Trust, Fairbridge, Geeta Bhavan Mandir (Hindu Temple), Jericho Foundation, Macmillan, Muath Trust, Nishkam Centre, Ramblers (Get Walking, Keep Walking), Saheli Women's Centre, Sandwell Mind, The Prince's Trust, UK Asian Women's Centre, Waterways Trust, Women's Help Centre, and Youth Inclusion Project (Conka Island Crew). The 'Macmillan' entry is highlighted. A red box highlights the scroll bar on the right side of the dropdown menu.

The user will need to scroll down the drop-down list menu until they reach records beginning with *M*.

This screenshot is similar to the previous one, but the 'Select Organisation' dropdown menu is scrolled down further. The 'Macmillan' entry is now highlighted, and it is the only entry visible within the red box. The rest of the interface remains the same.

Highlighting *Macmillan* with the mouse cursor and then left clicking will select the organisation record.

The screenshot shows the 'Relationship Tracker' interface with 'Macmillan' selected in the 'Select Organisation' dropdown menu. The dropdown menu is now closed, and the text 'Macmillan' is visible in the dropdown box. A red box highlights the 'Select Organisation' dropdown and the 'Go' button next to it. The rest of the interface remains the same.

Pressing the *Go* button to the right of the *Select Organisation* drop-down menu field will then recall the record to the main page.

The screenshot shows the 'Relationship Tracker' interface with the user logged in as 'stuartb'. The 'Select Organisation' dropdown menu is set to 'Macmillan', and the 'Go' button next to it is highlighted with a red box. The 'Record: 1 of 34' text is visible at the bottom of the search results area.

As seen below, the Macmillan record will now be presented. Users may wish to note the Record Selection Text stating *Record 1 of 1*. This means that one record is selected out of all of the organisation records.

The screenshot shows the 'Macmillan' record details. The 'Record: 1 of 1' text is highlighted with a red box. The record details are displayed in two columns: 'Primary Organisation Contact Details' and 'Relationship Development'. The 'Primary Organisation Contact Details' section includes fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The 'Relationship Development' section includes fields for Business Nature, Category, Relationship Status, Relationship Type, Primary Owner, Secondary Owner, Contact Freq. (Days), and Last Recorded Contact. The 'Record: 1 of 1' text is also visible at the bottom of the search results area.

To be able to select all of the records again, left click on the *Reset* button.

The screenshot shows the 'Relationship Tracker' interface with the user logged in as 'admin'. The 'Select Organisation' dropdown menu is set to 'Macmillan', and the 'Go' button next to it is highlighted with a red box. The 'Record: 1 of 1 found' text is visible at the bottom of the search results area. The 'Reset' button is also highlighted with a red box.

5.0 Accessing and Creating Contacts

Accessing the information stored within records on the Relationship Tracker is another key skill. In this chapter we will be discussing how to first access and then create contacts for organisation records.

Logged on as: admin

Relationship Tracker

health exchange

ABC Community Group

Select Category: Go

Select Organisation: ABC Community Group Go

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook:

Other Social:

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:

☐ Commissioner
 ☐ Potential Commissioner

☐ Competitor
 ☒ Reach Partner

☒ Community Site
 ☐ Service Partner

☐ Influencer
 ☐ Strategic

☐ Funder

Primary Owner: Stuart Brown

Secondary Owner:

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen ... X

The screenshot found above is of a record called *ABC Community Group*. In the record's main body we can see the tabbed portal area with the *Contacts* tab selected. This section provides basic details, such as name, role and email address, of staff members employed by the organisation.

In this case, one contact is currently being stored within this record. The user can clearly see that the individual's name is *Mr John Brown*, his role is listed as *Administrator* and contact telephone number is *0121 000 0000*.

Contacts				Communications	Services	Sites	Attachments	Activate Portal		
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability		
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen		

One can also see that Mr John Brown's *Relationship Status* is listed as *Established* and his Decision Making Ability at the *Recommender* level. These fields will be discussed in more detail shortly.

Within the same row as Mr John Smith's contact information we can see two buttons on the right hand side.

Contacts

Communications

Services

Sites

Attachments

Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen	<div><div></div><div></div></div>

Green button

The green button displays the contact information in an in-depth view with more fields for individuals to record important information on the contact.

Red button

If the user possesses necessary access privileges, the red button will delete the contact from the organisation. When deleted, contacts cannot be recovered.

5.1 Accessing the Contact's in-depth View

We will now enter the in-depth view by left clicking on the green button situated on the first contact row. The primary benefit of the in-depth view is that users have more space to read and record information relating to the contact.

Contacts

Communications

Services

Sites

Attachments

Activate Portal

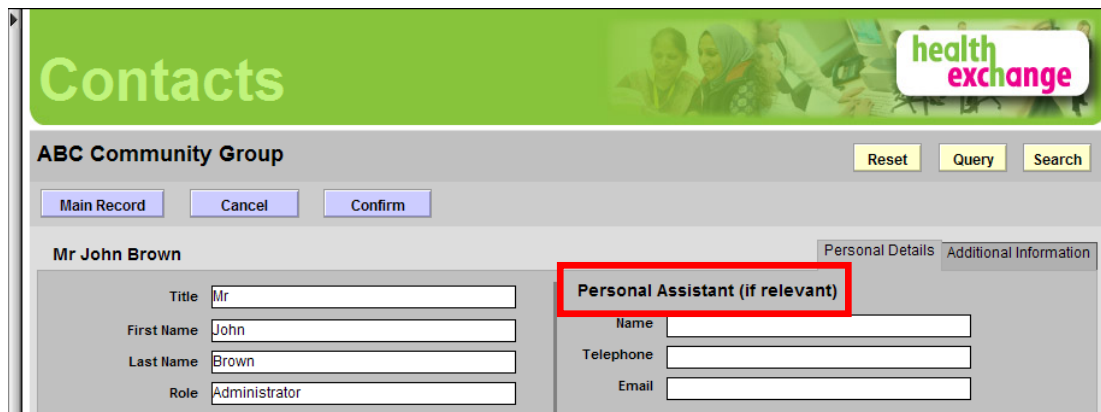
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability		
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen		

As seen below, this has opened a new view and layout of the contact record *Mr John Brown*.

The main page is named *Personal Details* (highlighted above). From the above screenshot, one can see additional fields for a fax number, address lines, and a section for recording notes.

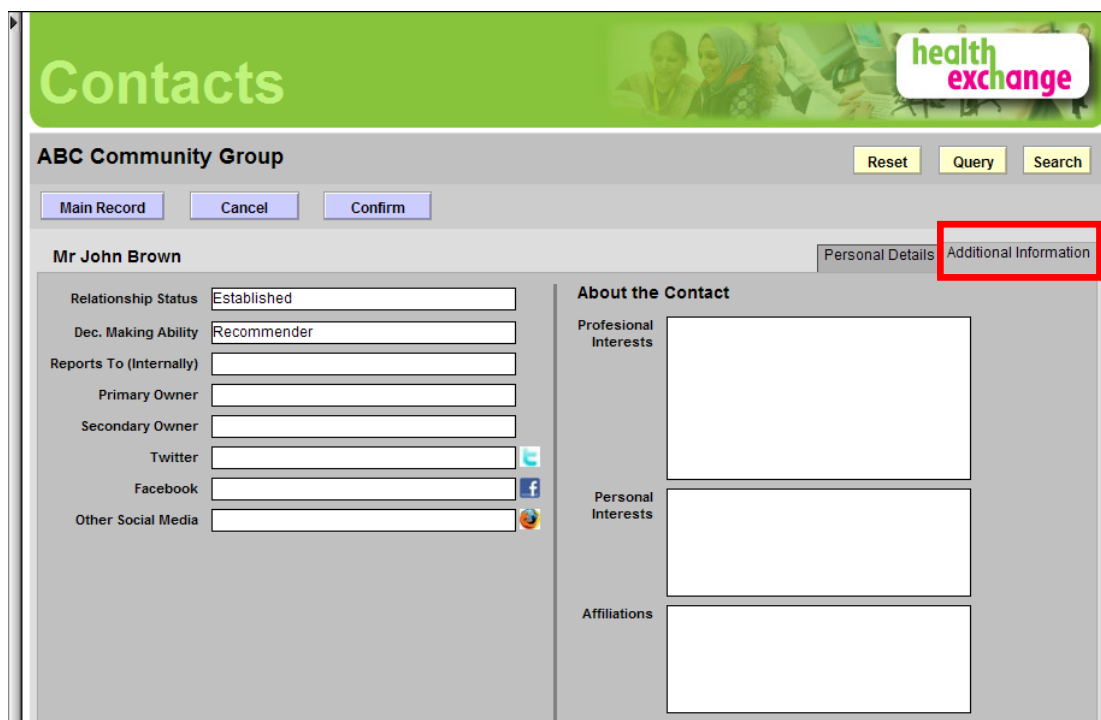
N.B. By default, address information for contacts is automatically sourced from the main record's address details. However users are able to change the contact's address if it differs from the main record's address.

On the right hand side of the page, we can also see a header named *Personal Assistant (if relevant)*. This section is for recording basic details on the contact's Personal Assistant, if necessary.



The screenshot shows the 'Contacts' form for 'ABC Community Group'. The form has a green header with the 'health exchange' logo. Below the header, there are buttons for 'Reset', 'Query', and 'Search'. The form is divided into two tabs: 'Personal Details' and 'Additional Information'. The 'Personal Details' tab is active, and the 'Personal Assistant (if relevant)' section is highlighted with a red box. This section contains fields for 'Name', 'Telephone', and 'Email'. The 'Personal Details' section also includes fields for 'Title', 'First Name', 'Last Name', and 'Role'.

Left clicking on the next tab named *Additional Information* provides further fields which users can record information on the contact. These are discussed in detail below:



The screenshot shows the 'Contacts' form for 'ABC Community Group'. The form has a green header with the 'health exchange' logo. Below the header, there are buttons for 'Reset', 'Query', and 'Search'. The form is divided into two tabs: 'Personal Details' and 'Additional Information'. The 'Additional Information' tab is active, and the 'Additional Information' section is highlighted with a red box. This section contains fields for 'Relationship Status', 'Dec. Making Ability', 'Reports To (Internally)', 'Primary Owner', 'Secondary Owner', 'Twitter', 'Facebook', and 'Other Social Media'. The 'Additional Information' section also includes a section for 'About the Contact' with fields for 'Professional Interests', 'Personal Interests', and 'Affiliations'.

Relationship Status

This field describes the strength and quality of the relationship which Health Exchange has with the individual contact. An *Established* contact means that the relationship is strong and on-going, whereas relationships defined as *Moribund* are of poor quality and largely inactive.

Decision Making Ability

The Decision Making Ability field assesses how much power the contact has within their organisation to make decisions. An *Approver* can make important strategic decisions, whereas an *Influencer* has an impact on the overall decision process.

Reports To (Internally)

This field is for detailing who the contact reports to within their own organisation.

Primary and Secondary Owner

Primary and Secondary Owner fields are for listing staff members within Health Exchange who owns and manages the external relationship.

Twitter, Facebook, and Other Social Media

These fields are for recording the individual contact's web addresses for social media sites such as Twitter.

About the Contact

To the right of the fields listed above is a section titled *About the Contact*. These fields are for recording in-depth information on the contact, including professional and personal interests, and affiliations which the contact regularly associates with.

The screenshot displays the 'Contacts' management interface for 'ABC Community Group'. The header includes the 'health exchange' logo. Below the header, there are buttons for 'Main Record', 'Cancel', 'Confirm', 'Reset', 'Query', and 'Search'. The contact's name 'Mr John Brown' is shown, along with tabs for 'Personal Details' and 'Additional Information'. The 'About the Contact' section is highlighted with a red box and contains three text input fields: 'Professional Interests', 'Personal Interests', and 'Affiliations'. To the left of this section, there are several other input fields: 'Relationship Status' (set to 'Established'), 'Dec. Making Ability' (set to 'Recommender'), 'Reports To (Internally)', 'Primary Owner', 'Secondary Owner', 'Twitter', 'Facebook', and 'Other Social Media'.

5.1.1 Getting Back to the Main Record

After accessing or entering information into the relevant contact fields, users can get back to the main record screen by left clicking the blue *Main Record* button at the top of the page.



5.2 Creating a New Contact

Disclaimer: For security purposes, the Relationship Tracker has an inactivity time limit of 15 minutes. This means that if the user does not use the Relationship Tracker for more than 15 minutes they will be logged out of the system. If the user fails to save their changes within this 15 minute time window, they will lose the information they have inputted. Hence it is important to regularly save changes made by pressing the **Confirm** button.

Creating a new contact is conducted via the record's main page.

Logged on as: admin

Relationship Tracker

health exchange

ABC Community Group

Select Category: [x] [Go] Select Organisation: ABC Community Group [x] [Go]

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook: [f]

Other Social: [f]

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:

- ☐ Commissioner
- ☐ Potential Commissioner
- ☐ Competitor
- ☒ Reach Partner
- ☒ Community Site
- ☐ Service Partner
- ☐ Influencer
- ☐ Strategic
- ☐ Funder

Primary Owner: Stuart Brown

Secondary Owner: []

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments

Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen [x]

The user must left click on the orange *Activate Portal* button from the right hand side of the page above the tabbed portal area.

Doing so opens the record into Browse Mode, allowing users access to the displayed fields.

Logged on as: admin

Relationship Tracker

health exchange

ABC Community Group

Select Category: * Go

Select Organisation: ABC Community Group Go

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook:

Other Social:

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:

- ☐ Commissioner
- ☐ Potential Commissioner
- ☐ Competitor
- ☒ Reach Partner
- ☒ Community Site
- ☐ Service Partner
- ☐ Influencer
- ☐ Strategic
- ☐ Funder

Primary Owner: Stuart Brown

Secondary Owner:

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon

To add a new contact, simply start entering information from the row directly below our previous entry for Mr John Brown.

Contacts Communications Services Sites Attachments Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon

Relationship Tracker User Manual: V1.1

Left clicking on the drop-down menu fields allows the user to select an option from the prescribed list.

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@example.co.uk	07901010101	0121 000 0000	Established	Recon
Mr								
Mrs								
Miss								
Ms								
Dr								
Prof								
Rev								
Sir								
Lord								
Lady								
Earl								
Baroness								

For text fields such as *First Name* and *Email*, simply left click within the field and enter the necessary information.

[Contacts](#)
[Communications](#)
[Services](#)
[Sites](#)
[Attachments](#)
[Activate Portal](#)

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon
Mr	Jane							

To save your new contact, left click on the blue *Confirm* button at the top of the page.

The screenshot shows the 'Relationship Tracker' interface for 'ABC Community Group'. At the top, there's a green header with the 'health exchange' logo. Below it, there are dropdown menus for 'Select Category' and 'Select Organisation'. A navigation bar contains buttons: 'Main Menu', 'Cancel', 'Confirm' (highlighted with a red box), 'Reset', 'Query', 'Search', and pagination controls. The main area is divided into two sections: 'Primary Organisation Contact Details' and 'Relationship Development'. The first section contains various input fields for contact information. The second section contains dropdowns for 'Business Nature', 'Category', 'Relationship Status', and 'Relationship Type', along with checkboxes for different roles. Below these is a table of contacts with columns: Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, Dec. Making Ability, and a green 'Confirm' button (highlighted with a red box) and a red 'X' button.

Alternatively, if you wish to cancel saving the new contact row, left click on the *Cancel* button instead.

This screenshot is similar to the previous one, but the 'Cancel' button in the navigation bar is highlighted with a red box instead of the 'Confirm' button.

If users wish to add more in-depth information for a particular contact, they can do so by left clicking on the green button in the tabbed portal (highlighted below).

This screenshot shows the contact table from the previous screenshot. The green button in the 'Dec. Making Ability' column for the first contact (Mr. John Brown) is highlighted with a red box.

5.3 Amending Contact Details

Users may also need to change or amend the recorded contacts listed for an organisation. For example, you may wish to change a contact's email address or update their Decision Making Ability listing.

To do this, left click on the *Activate Portal* button to enter Browse Mode.

Logged on as: admin

Relationship Tracker

health exchange

ABC Community Group

Select Category: [x] [Go] Select Organisation: ABC Community Group [Go]

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example Lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook:

Other Social:

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:
☐ Commissioner
☐ Potential Commissioner
☐ Competitor
☒ Reach Partner
☒ Community Site
☐ Service Partner
☐ Influencer
☐ Strategic
☐ Funder

Primary Owner: Stuart Brown

Secondary Owner:

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments

Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccomm	079010101010	0121 000 0000	Established	Recommen... X
Mrs	Jane	Smith	Project Manager	jane.smith@abccomm	079010101010	0121 000 0000	Prospect	Approver... X

5.3.1 Amendment Example

For example purposes imagine that Jane Smith changed her last name to Jones. To make this amendment the user would first need to left click on the *Activate Portal* button seen above.

The next step is to highlight the text in the Last Name field and delete *Smith*.

The screenshot shows a web application interface with a tabbed menu at the top: 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments'. The 'Contacts' tab is active. On the right, there is an 'Activate Portal' button. Below the tabs is a table with the following columns: Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability. The table contains three rows. The second row, for Jane Smith, has a red box around the 'Last Name' field.

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon
Mrs	Jane	Smith	Project Manager	jane.smith@abccommunity.co.uk	07901010101	0121 000 0000	Prospect	Approv

Clearing *Smith* from the *Last Name* field then allows the user to input the correct name.

This screenshot is similar to the previous one, but the 'Last Name' field for Jane Smith is now empty. A red box highlights the empty field.

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon
Mrs	Jane		Project Manager	jane.smith@abccommunity.co.uk	07901010101	0121 000 0000	Prospect	Approv

Jones can now be typed into the field.

This screenshot shows the 'Last Name' field for Jane Smith now contains the text 'Jones'. A red box highlights the field.

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Established	Recon
Mrs	Jane	Jones	Project Manager	jane.smith@abccommunity.co.uk	07901010101	0121 000 0000	Prospect	Approv

Left clicking the *Confirm* button at the top of the page will save this amendment to the record.

This screenshot shows the top of the Relationship Tracker interface. It includes a 'Logged on as: admin' status, a 'health exchange' logo, and a section for 'ABC Community Group'. There are dropdown menus for 'Select Category' and 'Select Organisation', both with 'Go' buttons. At the bottom, there are several buttons: 'Main Menu', 'Cancel', 'Confirm' (highlighted with a red box), 'Reset', 'Query', 'Search', and navigation buttons for 'Record: 1 of 1'.

N.B. The process for amending details is exactly the same for the in-depth contact view apart from the use of the orange *Activate Portal* button. Instead, users can simply left click on the relevant field they wish to amend in order to open the record in browse mode.

6.0 Accessing and Creating Communications

As Health Exchange staff members interact with external organisations they will inevitably learn new things and gain important information relevant to colleagues. The Relationship Tracker provides a method of recording important communications gained in various ways including emails, face-to-face conversations, meetings, letters and telephone calls. This information can then be shared and accessed by those who need it within Health Exchange.

The process of accessing or recording a communication is very similar to the one used to access a contact. The user must first start by recalling the record they wish to view. In this case we will be viewing the *ABC Community* record seen below.

Logged on as: admin

Relationship Tracker

health exchange

ABC Community Group

Select Category: Go

Select Organisation: ABC Community Group Go

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

Primary Organisation Contact Details

Organisation: ABC Community Group W

Address Line 1: 10 Example lane

Address Line 2: Erdington

City: Birmingham

County: West Midlands

Post Code: B23 5EX

Tel / Fax: 0121 000 0000 0121 000 0000

Website: www.abccommunity.co.uk

Twitter: @abccommunity

Facebook:

Other Social:

Relationship Development

Business Nature: ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.

Category: Other

Relationship Status: Established

Relationship Type:

☐ Commissioner ☐ Potential Commissioner

☐ Competitor ☒ Reach Partner

☒ Community Site ☐ Service Partner

☐ Influencer ☐ Strategic

☐ Funder

Primary Owner: Stuart Brown

Secondary Owner:

Contact Freq. (Days): 90

Last Recorded Contact: 25/07/2011 12:34:29

Contacts Communications Services Sites Attachments Activate Portal

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccomm	079010101010	0121 000 0000	Established	Recommen... X
Mrs	Jane	Smith	Project Manager	jane.smith@abccomm	079010101010	0121 000 0000	Prospect	Approver... X

When viewing the organisation record, the *Contacts* tab is selected by default. To view communications associated with the record, we will need to left click on the *Communications* tab.

Contacts **Communications** Services Sites Attachments Activate Portal



Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccomm	079010101010	0121 000 0000	Established	Recommen... X

Now that we have the *Communications* tab selected we can view the communications which members of Health Exchange have added for the organisation in question (in this case our organisation is named *ABC Community Group*).

The screenshot shows the 'Relationship Tracker' web application. At the top, it says 'Logged on as: admin'. The main header is 'Relationship Tracker' with a 'health exchange' logo. Below this, the 'ABC Community Group' profile is displayed. It includes fields for 'Select Category' and 'Select Organisation' (both set to 'ABC Community Group'). Navigation buttons include 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and pagination controls ('Record: 1 of 1', '< Previous', 'Next >').

The profile is divided into two sections: 'Primary Organisation Contact Details' and 'Relationship Development'. The contact details include fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The relationship development section includes fields for Business Nature, Category, Relationship Status, Relationship Type (with checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, and Funder), Primary Owner, Secondary Owner, Contact Freq. (Days), and Last Recorded Contact.

At the bottom, there is a tabbed interface with 'Contact', 'Communications', 'Services', 'Sites', and 'Attachments'. The 'Communications' tab is selected and highlighted with a red box. Below the tabs is a table of communications:

Title	Attendees	Communication Type	Notes	Added By	Date & Time	
Meeting with Mr. John Brown	2 - Mr. John Brown and myself	Meeting	Meeting to discuss leaflet design and future events.	stuartb	25/07/2011 12:34:29	 

As seen above, there is one entry added for this *ABC Community Group* so far.

Title

This field is used to describe in concise terms what the communication involved. Users may wish to add where, if relevant, the communication has taken place.

Attendees

If relevant, the user can add who attended the communication¹⁰.

Communication Type

This field is a drop-down menu where the user can select what type of communication they had with the individual from the organisation.

Notes

Details of what the communication entailed can be added in the *Notes* field.

¹⁰ This is particularly useful if the communication type was a meeting. However it is of little relevance if the correspondence was made by email or telephone and hence can be left blank.

Added By

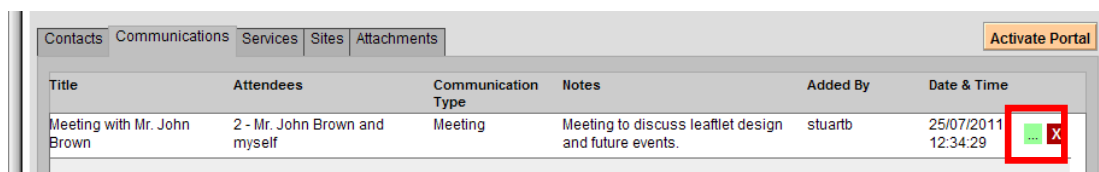
This field is automatically generated by the Relationship Tracker, recording the individual's username who added the communication. For example, if James Kay added the communication, the username would be listed in this field as *JamesK*.


Date & Time

The *Date & Time* field is another automatically generated field recording when the user inputted the communication.

6.1 Accessing the Communication's in-depth View

Just like the contacts page discussed in the previous chapter, the Communications page also has an in-depth view. This is accessed by left clicking on the green button.



Contacts	Communications	Services	Sites	Attachments	Activate Portal	
Title	Attendees	Communication Type	Notes	Added By	Date & Time	
Meeting with Mr. John Brown	2 - Mr. John Brown and myself	Meeting	Meeting to discuss leaflet design and future events.	stuartb	25/07/2011 12:34:29	

The in-depth communications view will then be presented.



Communications

ABC Community Group

Reset Query Search

Main Record Cancel **Confirm** Activate Portal

Meeting with Mr. John Brown Details Status

Title: Meeting with Mr. John Brown

Communication Type: Meeting

Attendees: 2 - Mr. John Brown and myself

Notes: Meeting to discuss leaflet design and future events.

Date Time: 25/07/2011 12:34:29

Added By: stuartb

Partner Relations (Visits)

Detail

Actions

Outcomes

Users can input or change information by left clicking within the relevant fields seen above and then left clicking the *Confirm* button at the top of the page.

As seen below, on the right hand side of the page is three fields relating to *Partner Relations (Visits)*. As the title suggests, these are fields specifically for the Partner Relations team to record information on their visits to the organisation.

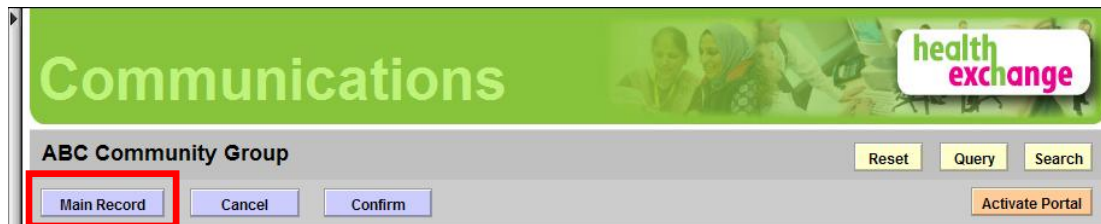
The screenshot shows a web application interface for 'Communications'. At the top, there's a green banner with the word 'Communications' and a 'health exchange' logo. Below this, the form is for 'ABC Community Group'. It has buttons for 'Main Record', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and 'Activate Portal'. The main record shows 'Meeting with Mr. John Brown' with fields for Title, Communication Type, Attendees, Notes, Date Time, and Added By. On the right, there's a 'Details' tab and a 'Status' tab. A red box highlights the 'Partner Relations (Visits)' section, which contains three empty text areas labeled 'Detail', 'Actions', and 'Outcomes'.

Users may also notice another tab on this page called *Status*. This, again, is solely used by the Partner Relations team¹¹.

This screenshot shows the same 'Communications' form, but with the 'Status' tab highlighted by a red box. The 'Status' tab is located next to the 'Details' tab on the right side of the form.

¹¹ Only users with higher user access levels will be able to see this content due to its potentially sensitive nature.

The user can navigate back to the main record page by left clicking on the blue *Main Record* button.







7.0 Creating an Organisation Record

N.B. Before creating a new record it is important to first check whether the organisation has already been created within the Relationship Tracker. **See chapter 4.0** for further details on how to find organisation records.

As well as creating contacts and communication records for existing external organisations, users may also need to create new records for those organisations not yet inputted within the Relationship Tracker.

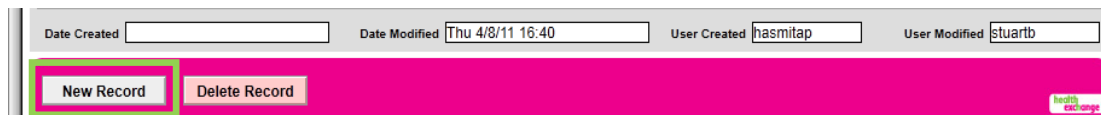
If a record for the organisation is not present on the Relationship Tracker, users can request their line manager (lead or senior manager) to create the record. The following protocol advises users on how this should be carried out.

7.1 Record Creation Protocol

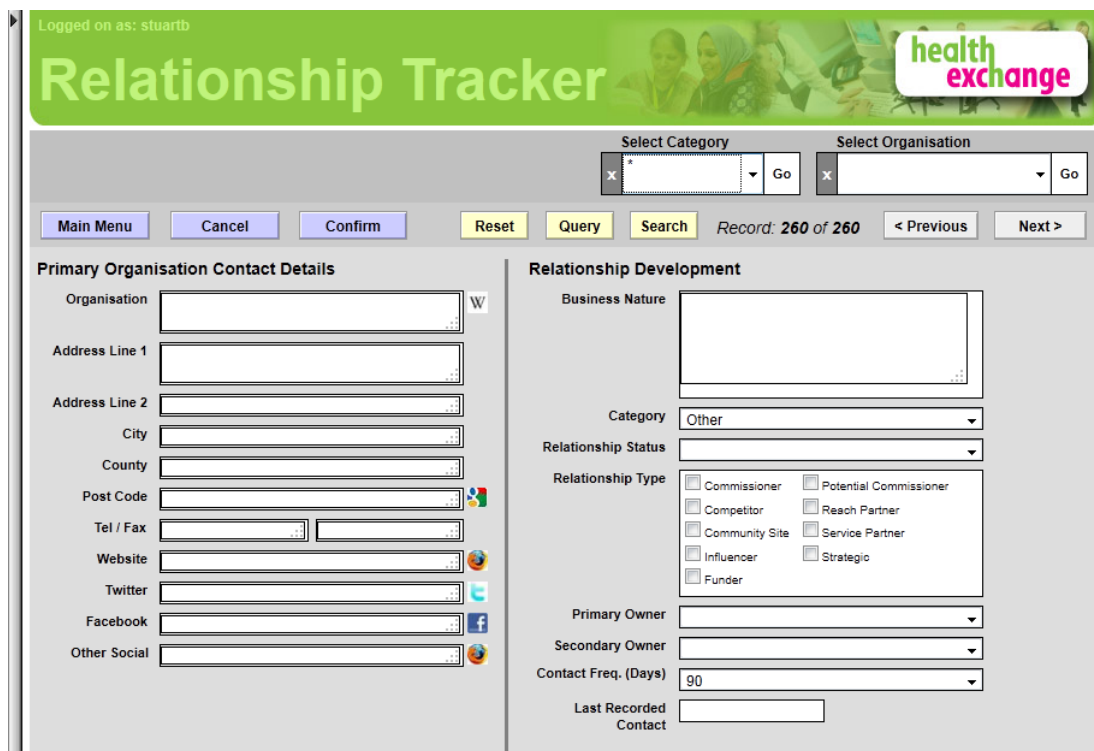
1. The user makes sure that a record for the organisation in mind does not exist.

2. The user contacts their line manager requesting them to create the new record.

3. Basic name, address, and contact details are supplied by the user to the line manager.

4. The line manager creates the new record based on these details and notifies the user.

5. The user is then free to add further information, such as contacts and communications, to the new record.

7.2 Record Creation Guide

Creating a new organisation record is a simple process and involves scrolling down to the bottom of the main record page layout. At the bottom of the layout we can see the footer section. Left clicking the *New Record* button highlighted below in green will start the creation process.



Doing so will present a new blank record.



The user must now enter information into key fields including *Organisation*, as well as some basic address details.

7.3 Record Creation Example

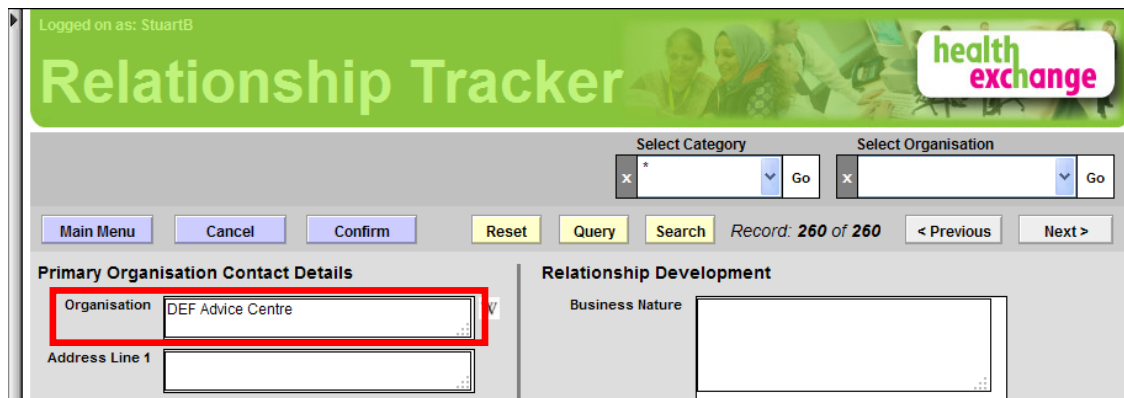
For the purpose of this example, a record will be created for a fictitious organisation named *DEF Advice Centre*.

As noted above, the first step is to scroll down to the bottom of the page and left click the *New Record* button in the footer section.

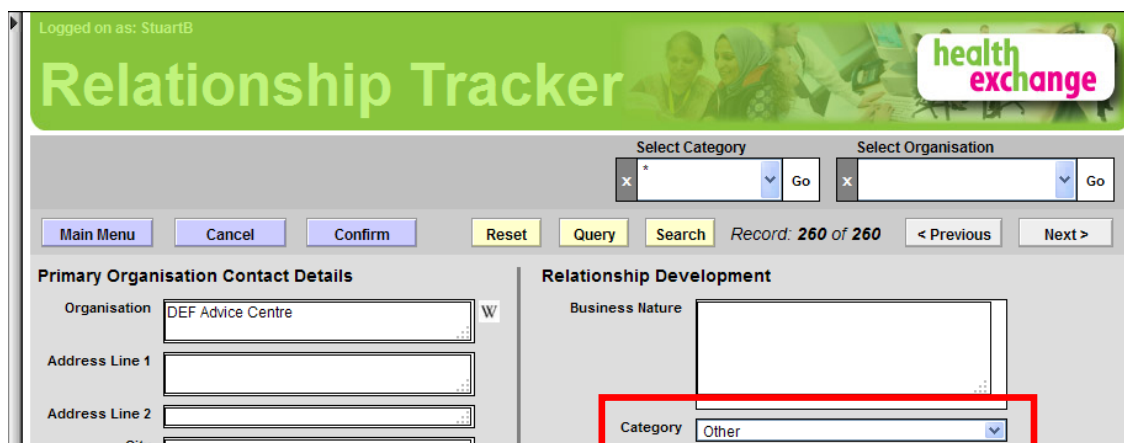
Relationship Tracker User Manual: V1.1



We will now need to enter the organisation name *DEF Advice Centre* into the *Organisation* field.



N.B. The *Category* field listed under the *Relationship Development* area defaults to *Other*. To choose more suitable category, the user must choose from another category from the drop-down menu selection list.



Left clicking on the drop-down menu chevron arrow will present the category list to the user.

Logged on as: StuartB

Relationship Tracker

health exchange

Select Category: * [v] Go Select Organisation: * [v] Go

Main Menu Cancel Confirm Reset Query Search Record: 260 of 260 < Previous Next >

Primary Organisation Contact Details

Organisation: DEF Advice Centre [W]

Address Line 1: 90 Example Road

Address Line 2: Digbeth

City: Birmingham

County: West Midlands

Post Code: B12 0HL

Tel / Fax: 0121 111 1111 0121 222 2222

Website: www.defadvicecentre.co.uk

Twitter:

Facebook:

Other Social:

Relationship Development

Business Nature: DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.

Category: Other [v]

Relationship Status:

Relationship Type:

Primary Owner:

Secondary Owner:

Contact Freq. (Days):

Last Recorded Contact:

Contacts Communications Services Sites Attachments

Activate Portal

The user can now enter address and contact fields found under the *Primary Organisation Contact Details* title.

Logged on as: StuartB

Relationship Tracker

health exchange

Select Category: * [v] Go Select Organisation: * [v] Go

Main Menu Cancel Confirm Reset Query Search Record: 260 of 260 < Previous Next >

Primary Organisation Contact Details

Organisation: DEF Advice Centre [W]

Address Line 1: 90 Example Road

Address Line 2: Digbeth

City: Birmingham

County: West Midlands

Post Code: B12 0HL

Tel / Fax: 0121 111 1111 0121 222 2222

Website: www.defadvicecentre.co.uk

Twitter:

Facebook:

Other Social:

Relationship Development

Business Nature: DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.

Category: Other [v]

Relationship Status:

Relationship Type:

Primary Owner:

Secondary Owner:

Contact Freq. (Days): 90

Information can also be added into the *Relationship Development* section highlighted below.

The screenshot shows the 'Relationship Tracker' web application. At the top, it says 'Logged on as: StuartB'. The main header is 'Relationship Tracker' with the 'health exchange' logo. Below the header, there are search filters for 'Select Category' and 'Select Organisation', both with a dropdown menu and a 'Go' button. A navigation bar contains buttons: 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and pagination information 'Record: 260 of 260' with '< Previous' and 'Next >' buttons. The left sidebar is titled 'Primary Organisation Contact Details' and contains fields for Organisation (DEF Advice Centre), Address Line 1 (90 Example Road), Address Line 2 (Diabeth), City (Birmingham), County (West Midlands), Post Code (B12 0HL), Tel / Fax (0121 111 1111 / 0121 222 2222), Website (www.defadvicecentre.co.uk), Twitter, Facebook, and Other Social. The right panel is titled 'Relationship Development' and is highlighted with a red box. It contains fields for Business Nature (DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.), Category (Other), Relationship Status (Prospect), Relationship Type (Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, Funder), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact.

After entering the necessary information into the relevant fields, users can press the *Confirm* button to save inputted data. Alternatively, the user can press the *Cancel* button which will remove the new record.

This screenshot shows the same 'Relationship Tracker' interface as the previous one, but with a red box highlighting the 'Cancel' and 'Confirm' buttons in the navigation bar. The 'Cancel' button is on the left and the 'Confirm' button is on the right of the red box. The rest of the interface, including the search filters, navigation bar, and the 'Relationship Development' section, remains the same.

After successfully saving the record, users will be able to see the name of the record, in this case *DEF Advice Centre*, at the top of the page in the header section.

The screenshot shows the 'Relationship Tracker' interface. At the top, it says 'Logged on as: StuartB'. The main header area has a green background with the 'health exchange' logo. Below this, the record name 'DEF Advice Centre' is displayed in a red-bordered box. To the right of the record name are two search filters: 'Select Category' and 'Select Organisation', each with a dropdown menu and a 'Go' button. Below these are several buttons: 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and navigation buttons '< Previous' and 'Next >'. The record count is shown as 'Record: 260 of 260'. The main content area is divided into two sections: 'Primary Organisation Contact Details' and 'Relationship Development'. The 'Primary Organisation Contact Details' section contains fields for Organisation (DEF Advice Centre), Address Line 1 (90 Example Road), Address Line 2 (Digbeth), City (Birmingham), County (West Midlands), Post Code (B12 0HL), Tel / Fax (0121 111 1111 / 0121 222 2222), Website (www.defadvicecentre.co.uk), Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature (DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.), Category (Other), Relationship Status (Prospect), Relationship Type (Commissioner, Competitor, Community Site, Influencer, Funder, Potential Commissioner, Reach Partner, Service Partner, Strategic), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact. At the bottom of the main content area are tabs for 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments', and an 'Activate Portal' button. Below the tabs is a table header with columns: Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability.

New contacts or communications can now be added using the instructions found in previous chapters.

Users may also wish to note that the Record Selection Text has changed to *Record: 260 of 260*.

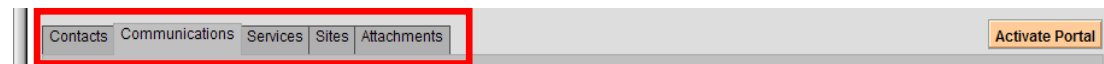
This screenshot is identical to the one above, showing the 'Relationship Tracker' interface with the record for 'DEF Advice Centre'. It highlights the record name at the top and the record count 'Record: 260 of 260'.

As seen below, date and user creation fields have also been stored within the footer section.

The screenshot shows the footer section of the interface. It contains fields for 'Date Created' (Fri 5/8/11 12:29), 'Date Modified' (Fri 5/8/11 12:41), 'User Created' (StuartB), and 'User Modified' (StuartB). Below these fields are two buttons: 'New Record' and 'Delete Record'. The 'health exchange' logo is visible in the bottom right corner.

8.0 Other Sections of the Relationship Tracker

Having discussed how to access and input contacts and communications, as well as create organisation records, attention can now turn to other sections of the Relationship Tracker. As seen from the below screen, areas named *Services*, *Sites*, and *Attachments* are also present within the tabbed section. Each of these tabbed sections operates within the same systematic way as demonstrated in previous chapters.



8.1 Services

The services section is for inputting information related to Health Exchange programmes and services that have been provided to, or through, the external organisation currently being viewed.

Services Provided to the Organisation

☐ Chronic Disease Educator
 ☐ Events
 ☐ Health Supporter
 ☐ Quality of Life
 ☐ Walks
 ☐ EPP
 ☐ Health Trainer
 ☐ Macmillan
 ☐ Support Plus

Service Activity Level

☐ Ongoing Programme
 ☐ No Activity

Service Information

CDE | EPP | Events | Health Trainer | Health Supporter | Macmillan | QOL | Support Plus | Walks

Start Date (dd/mm/yyyy)	End Date (dd/mm/yyyy)	Attendees Figures	Comments

Date Created: Mon 25/7/11 9:27
 Date Modified: Mon 25/7/11 9:27
 User Created: admin
 User Modified: admin

New Record
 Delete Record

8.1.1 Service Example

For example purposes, imagine if *ABC Community* were involved in Health Exchange's Health Trainer, EEP and Events services. To demonstrate this on the Relationship Tracker, users can simply left click on the corresponding checkbox set list highlighted below.

The screenshot shows the 'Services' tab in the Relationship Tracker. The 'Services Provided to the Organisation' section contains a checkbox set list with the following items: Chronic Disease Educator, Events (checked), Health Supporter, Quality of Life, Walks, EPP (checked), Health Trainer, Macmillan, and Support Plus. A red box highlights this list. To the right, the 'Service Activity Level' section has two radio buttons: 'Ongoing Programme' and 'No Activity'. Below this, the 'Service Information' section shows a table with columns for Start Date, End Date, Attendees Figures, and Comments. At the bottom, there are fields for Date Created, Date Modified, User Created, and User Modified, along with 'New Record' and 'Delete Record' buttons.

To the right of this checkbox set list is a radio button field¹² entitled *Service Activity Level*. The *Service Activity Level* notifies the user as to whether Health Exchange services are currently being provided to the external organisation in question.

This screenshot is similar to the previous one, but the 'Service Activity Level' section is highlighted with a red box. It shows the 'Ongoing Programme' and 'No Activity' radio buttons. The 'Services Provided to the Organisation' section is also visible, with the same checkbox set list.

In our example *ABC Community Group* are currently involved in Health Exchange's services. As a result, the *Ongoing Programme* radio button should be selected to denote that Health Exchange services are currently being delivered for *ABC Community Groups*.

This screenshot shows the 'Service Activity Level' section with the 'Ongoing Programme' radio button selected, indicated by a blue dot. The 'Services Provided to the Organisation' section is also visible, with the same checkbox set list.

¹² Radio button fields are very similar to checkbox set lists but allow the user to select only one option.

8.1.2 Service Information

As seen below, *Service Information* is another section found within the services tab.

The screenshot shows the 'Services' tab in the Relationship Tracker application. The 'Service Information' section is highlighted with a red border. It contains a table with columns for Start Date, End Date, Attendees Figures, and Comments. The table is currently empty. Above the table, there are tabs for CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. The 'Service Activity Level' section shows 'Ongoing Programme' selected. The 'Services Provided to the Organisation' section shows checkboxes for Chronic Disease Educator, EPP, Events, Health Trainer, Health Supporter, Macmillan, Quality of Life, Support Plus, and Walks. The 'Date Created' and 'Date Modified' fields both show 'Mon 25/7/11 9:27'. The 'User Created' and 'User Modified' fields both show 'admin'. The 'New Record' and 'Delete Record' buttons are at the bottom.

This area is for recording details on the services provided to the external organisation currently being viewed. Each Health Exchange service has its own tab for recording related information.

The first three tabs, *CDE*, *EPP*, and *Events*, are tabbed portals containing the following fields:

Start Date (dd/mm/yyyy)

This field is a drop-down calendar menu which allows the user to select the exact date of when the service commenced for the external organisation.

End Date (dd/mm/yyyy)

This is another drop-down calendar field where, if relevant, an end date can be inputted to detail when the service concluded at the external organisation.

Attendees Figures

The *Attendees Figures* field allows the user to add information on how many people attended a particular event or the amount of referrals obtained through the external organisation between the start and end dates.

Comments

This field is an area for detailing any additional information which users may wish to provide.

8.1.3 Entering Data for CDE, EEP and Events

Entering data into the CDE, EEP or Events tabbed portals can be achieved by left clicking the *Activate Portal* button.

The screenshot shows the 'Services' tab selected in the top navigation bar. The 'Activate Portal' button is highlighted with a red box. The main content area is divided into two sections: 'Services Provided to the Organisation' and 'Service Activity Level'. The 'Services Provided to the Organisation' section contains a grid of checkboxes for various services: Chronic Disease Educator, EPP, Events, Health Trainer, Health Supporter, Macmillan, Quality of Life, Support Plus, and Walks. The 'Service Activity Level' section contains two radio buttons: 'Ongoing Programme' and 'No Activity'. Below these sections is the 'Service Information' section, which includes a sub-tabbed interface with tabs for CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. The 'Events' tab is currently selected, showing a table with columns for Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), Attendees Figures, and Comments. The table is currently empty. At the bottom of the form, there are fields for Date Created, Date Modified, User Created, and User Modified, all showing 'Mon 25/7/11 9:27' and 'admin' respectively. A pink bar at the bottom contains 'New Record' and 'Delete Record' buttons, and a small 'health exchange' logo is visible in the bottom right corner.

The user will now have to left click the *Services* tab.

This screenshot shows the top navigation bar of the Relationship Tracker interface. The 'Services' tab is highlighted with a red box, indicating it is the next step in the process. The 'Activate Portal' button is also visible in the top right corner.

After doing so it is necessary to select the relevant service tab. For this example we will be entering information in the *Events* service tab.

The screenshot shows the 'Services Provided to the Organisation' form. At the top, there are tabs for 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments'. The 'Services' tab is active. Below the tabs, there are two main sections: 'Services Provided to the Organisation' and 'Service Activity Level'. The 'Services Provided to the Organisation' section has a grid of checkboxes for various services: Chronic Disease Educator, Events, Health Supporter, Quality of Life, Walks, EPP, Health Trainer (checked), Macmillan, and Support Plus. The 'Service Activity Level' section has two radio buttons: 'Ongoing Programme' (selected) and 'No Activity'. Below these is the 'Service Information' section, which has a row of tabs: CDE, EPP, Events (highlighted with a red box), Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below the tabs is a table with columns: Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), Attendees Figures, and Comments. The first row of the table is empty. At the bottom of the form, there are fields for 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (stuartb). At the very bottom, there are two buttons: 'New Record' and 'Delete Record'. A 'health exchange' logo is in the bottom right corner.

One can input the *Start Date* and *End Date* information by left clicking on the calendar button highlighted below and then selecting the correct date.

This is a close-up screenshot of the 'Service Information' section of the form. It shows the 'Events' tab selected. Below the tabs is a table with columns: Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), Attendees Figures, and Comments. The first row of the table is empty. The 'Start Date' and 'End Date' fields are highlighted with a red box, and each has a small calendar icon to its right for date selection. At the bottom of the form, there are fields for 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (stuartb). At the very bottom, there are two buttons: 'New Record' and 'Delete Record'. A 'health exchange' logo is in the bottom right corner.

Information can be entered into the *Attendance Figures* and *Comments* fields in the same manner as discussed in previous chapters.

The screenshot shows the 'Service Information' form. At the top, there are tabs for CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below the tabs, there are four main input fields: Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), Attendees Figures, and Comments. The Attendees Figures field contains the value '120'. The Comments field contains the text 'Here is a comments section for entering additional information relating to events.' A red rectangle highlights the Attendees Figures and Comments fields. At the bottom of the form, there are fields for Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb). Below these fields, there are two buttons: 'New Record' and 'Delete Record'. The 'health exchange' logo is visible in the bottom right corner.

After filling in all relevant fields, one can save the information by left clicking the *Confirm* button at the top of the page.

The screenshot shows the top section of the Relationship Tracker interface. It includes a green header with the text 'Logged on as: stuartb' and 'Relationship Tracker'. Below the header, there is a navigation bar with the text 'ABC Community Group'. To the right of the navigation bar, there are two dropdown menus: 'Select Category' and 'Select Organisation'. The 'Select Organisation' dropdown is currently set to 'ABC Community Group'. Below the dropdowns, there are several buttons: 'Main Menu', 'Cancel', 'Confirm' (highlighted with a red rectangle), 'Reset', 'Query', 'Search', and 'Record: 1 of 1 found'. There are also '< Previous' and 'Next >' buttons. The 'health exchange' logo is visible in the top right corner.

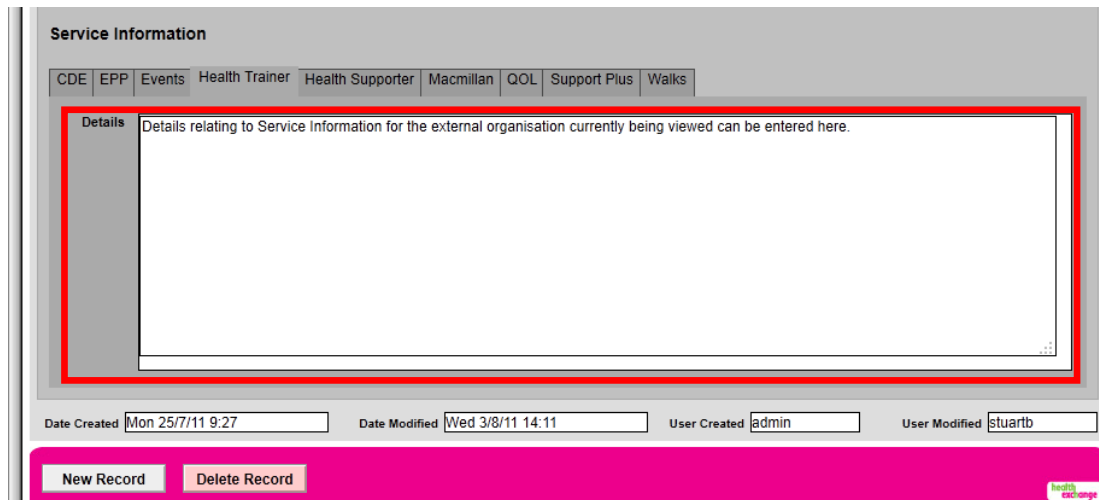
8.1.4 Entering Data for all Other Services

Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks tabs have a very simple *Details* field in which users can record important information related to the service.

The screenshot shows the 'Service Information' form with the 'Details' field highlighted. The 'Details' field is a large text area for entering information. The form includes the same tabs as the previous screenshot: CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. At the bottom of the form, there are fields for Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb). Below these fields, there are two buttons: 'New Record' and 'Delete Record'. The 'health exchange' logo is visible in the bottom right corner.

Relationship Tracker User Manual: V1.1

To enter information into these fields, users can left click within the *Details* field and start typing.



The screenshot shows a web application interface for 'Service Information'. At the top, there is a horizontal menu with tabs: CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below this menu is a large text area labeled 'Details' on the left. The text area contains the instruction: 'Details relating to Service Information for the external organisation currently being viewed can be entered here.' The text area is outlined with a red border. Below the text area, there are four input fields: 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (stuartb). At the bottom of the form, there is a pink bar containing two buttons: 'New Record' and 'Delete Record'. In the bottom right corner of the pink bar, there is a small logo for 'health exchange'.

Once again, users must save the information by left clicking the *Confirm* button at the top of the page.

8.2 Sites

The Sites tab is an area for inputting additional address locations and contact information for external organisations¹³.

Site Name	Type	Internal Lead	External Contact	Tel.	Email	Address Line 1	Address Line 2	City	Post Code

Date Created: Mon 25/7/11 9:27 Date Modified: Wed 3/8/11 14:11 User Created: admin User Modified: stuartb

New Record Delete Record health exchange

Below are brief descriptions of the fields found within the *Sites* area:

Site Name

The name or title of the external organisation's site

Type

This field is a drop-down menu with two options¹⁴; *HQ* or *2nd*. *HQ* is for listing the site as a headquarter building, whilst *2nd* denotes a satellite or secondary building.

Internal Lead

The Internal Lead field is a drop-down menu list of Health Exchange staff members. A staff member can be chosen to display who internally within Health Exchange owns or manages the relationship with that particular site.

External Contact

A contact name of an employee who works at the external organisation's site can be added here.

Tel. (Telephone), Email, Address Line 1, Address Line 2, City, Post Code

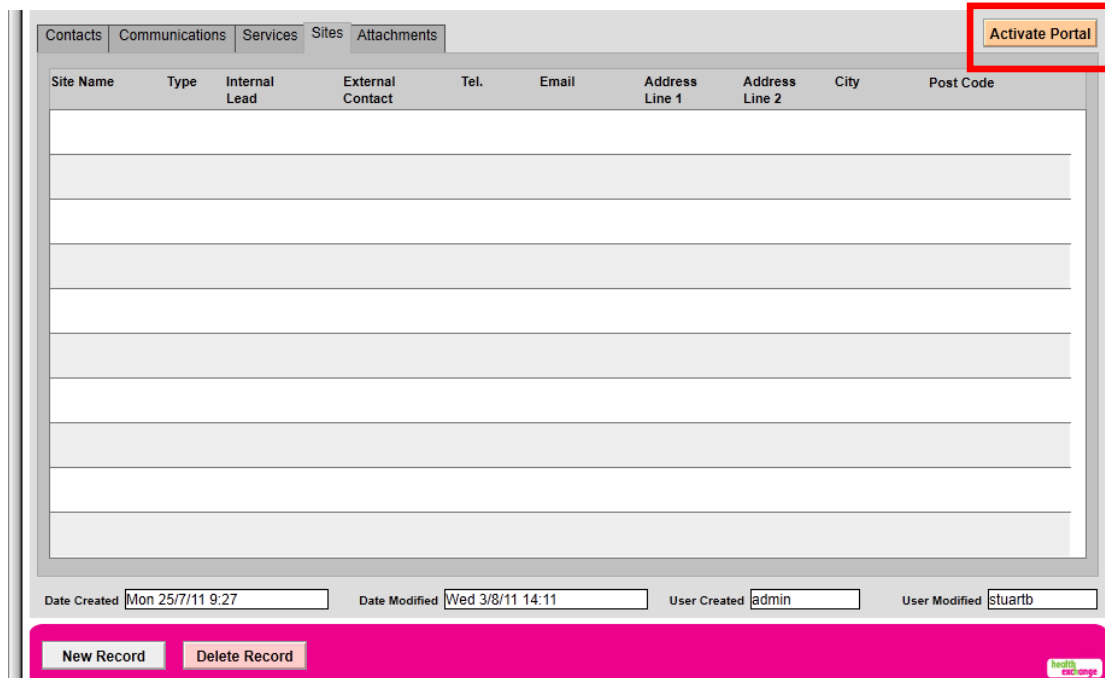
These are self explanatory fields used for entering contact and address information.

¹³ This section is only necessary if the external organisation in question has more than one site or building.

¹⁴ Users can also choose to leave this drop-down menu field blank.

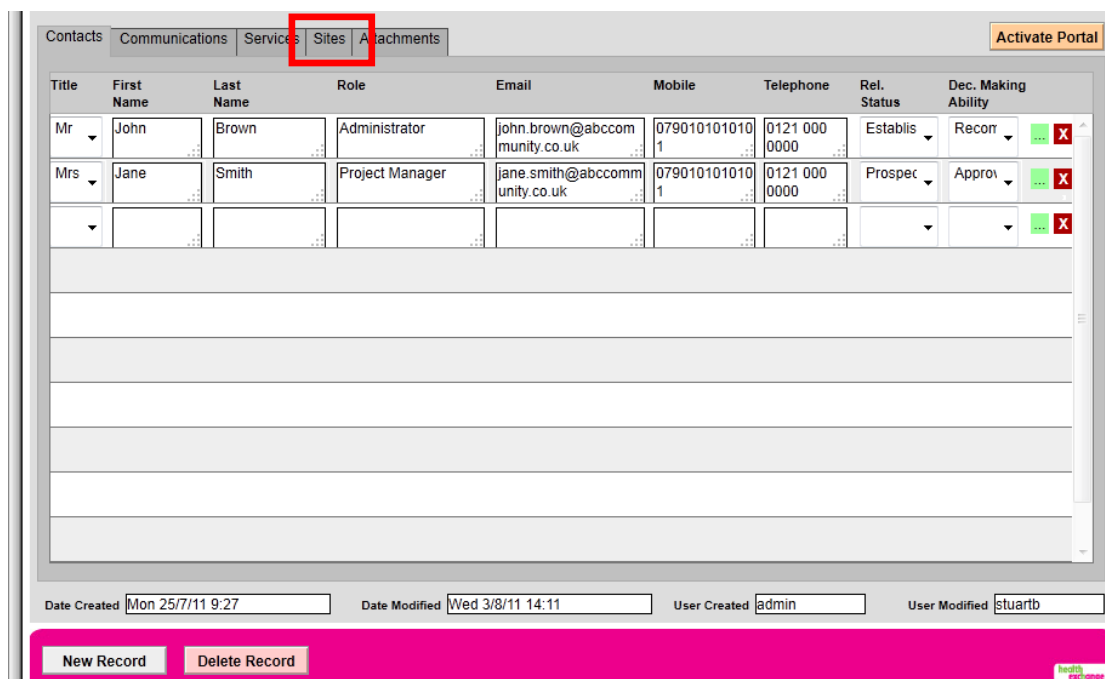
8.2.1 Creating a New Site

To create a new site for an external organisation, one must first left click on the *Portal Activation* button.



The screenshot shows the 'Relationship Tracker' interface. At the top, there are tabs: 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments'. The 'Activate Portal' button is located in the top right corner and is highlighted with a red rectangular box. Below the tabs is a table with the following columns: 'Site Name', 'Type', 'Internal Lead', 'External Contact', 'Tel.', 'Email', 'Address Line 1', 'Address Line 2', 'City', and 'Post Code'. The table is currently empty. At the bottom of the interface, there are fields for 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (stuartb). Below these fields are two buttons: 'New Record' and 'Delete Record'. A 'health exchange' logo is visible in the bottom right corner.

Users must now left click on the *Sites* tab highlighted below.



The screenshot shows the 'Relationship Tracker' interface with the 'Sites' tab highlighted in a red rectangular box. The 'Activate Portal' button is still visible in the top right corner. The table below the tabs now contains data. The columns are: 'Title', 'First Name', 'Last Name', 'Role', 'Email', 'Mobile', 'Telephone', 'Rel. Status', and 'Dec. Making Ability'. The table has three rows of data. The first row shows 'Mr John Brown' as an 'Administrator' with email 'john.brown@abccommunity.co.uk' and mobile '07901010101'. The second row shows 'Mrs Jane Smith' as a 'Project Manager' with email 'jane.smith@abccommunity.co.uk' and mobile '07901010101'. The third row is empty. At the bottom of the interface, there are fields for 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (stuartb). Below these fields are two buttons: 'New Record' and 'Delete Record'. A 'health exchange' logo is visible in the bottom right corner.

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	07901010101	0121 000 0000	Establis	Recon
Mrs	Jane	Smith	Project Manager	jane.smith@abccommunity.co.uk	07901010101	0121 000 0000	Prospec	Approv

Relationship Tracker User Manual: V1.1

As seen within previous chapters, entering the relevant information within the newly created row is now required.

The screenshot shows the 'Sites' tab in the Relationship Tracker application. The table has the following columns: Site Name, Type, Internal Lead, External Contact, Tel., Email, Address Line 1, Address Line 2, City, and Post Code. The first row contains the following data: Site Name: ABC Advice Centre, Type: 2n, Internal Lead: Stuart Brown, External Contact: Jane Jones, Tel.: 0121 000 0000, Email: jane.jones@abccommunity, Address Line 1: 1 Fictitious Road, Address Line 2: Digbeth, City: Birmingham, Post Code: B12 0HK. A red border highlights the first row. At the bottom of the table, there are buttons for 'New Record' and 'Delete Record'. The bottom status bar shows 'Date Created: Mon 25/7/11 9:27', 'Date Modified: Wed 3/8/11 14:11', 'User Created: admin', and 'User Modified: stuartb'. An 'Activate Portal' button is located in the top right corner.

Site Name	Type	Internal Lead	External Contact	Tel.	Email	Address Line 1	Address Line 2	City	Post Code
ABC Advice Centre	2n	Stuart Brown	Jane Jones	0121 000 0000	jane.jones@abccommunity	1 Fictitious Road	Digbeth	Birmingham	B12 0HK

Date Created: Mon 25/7/11 9:27 Date Modified: Wed 3/8/11 14:11 User Created: admin User Modified: stuartb

New Record Delete Record

Left clicking on the *Confirm* button at the top of the page will then save the newly created site.

Users may notice a new button within the portal row on the right hand side of the page (*highlighted below*). Left clicking this button will launch a new web browser window tab¹⁵ and display the site location, based on the inputted post code, within Google Maps.

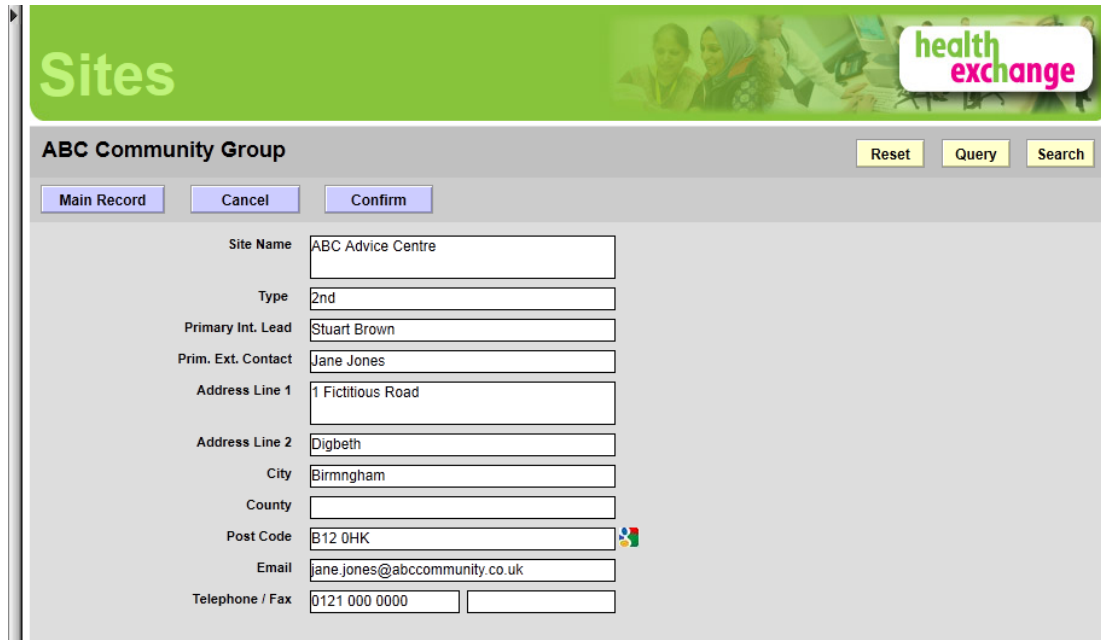
This screenshot is similar to the previous one, showing the 'Sites' tab. The first row of the table is highlighted with a red border, and a red box highlights the 'Confirm' button (represented by a small icon) at the end of the first row. The data in the table is the same as in the previous screenshot.

Site Name	Type	Internal Lead	External Contact	Tel.	Email	Address Line 1	Address Line 2	City	Post Code
ABC Advice Centre	2nd	Stuart Brown	Jane Jones	0121 000 0000	jane.jones@abccommunity	1 Fictitious Road	Digbeth	Birmingham	B12 0HK

¹⁵ Staff members may first need to enable pop-ups to ensure this feature launches.

8.2.2 Sites in-depth View

As seen in previous chapters, pressing the green button on the row will present the site information within the in-depth view.



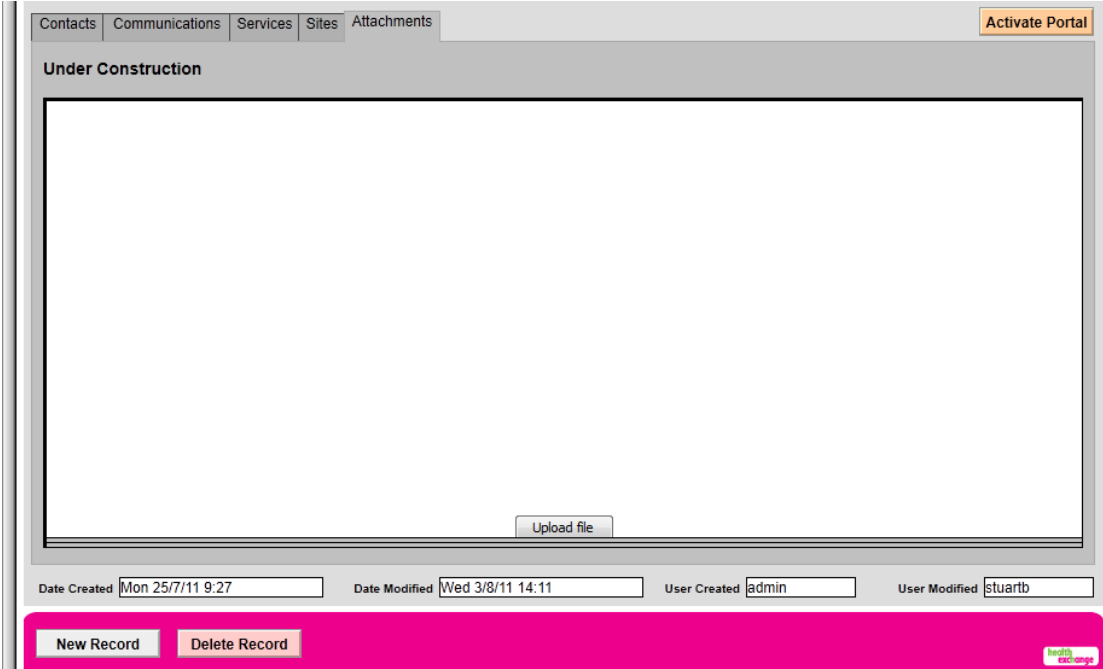
The screenshot shows a web application interface for 'health exchange'. The main header is green with the word 'Sites' in large white letters. Below the header, there's a grey bar with the text 'ABC Community Group' on the left and three buttons: 'Reset', 'Query', and 'Search' on the right. Underneath this bar, there are three buttons: 'Main Record', 'Cancel', and 'Confirm'. The main content area is a form with the following fields:

Site Name	ABC Advice Centre
Type	2nd
Primary Int. Lead	Stuart Brown
Prim. Ext. Contact	Jane Jones
Address Line 1	1 Fictitious Road
Address Line 2	Digbeth
City	Birmingham
County	
Post Code	B12 0HK
Email	jane.jones@abccommunity.co.uk
Telephone / Fax	0121 000 0000

Left clicking the *Main Menu* button will bring the user back to the main page.

8.3 Attachments

The attachments section is currently under construction and inaccessible to all users. When completed, the attachments area will allow users to save and access files relating to the selected external organisation.



Glossary of Terms

Activity Icons

Activity icons are small buttons primarily situated on the main record page. The icons are used to take the user to additional information related to the external organisation record which is found via the Internet. Wikipedia, Google Maps, and Twitter web pages are three examples of activity icons.

Buttons

Buttons are used to perform certain tasks within the Relationship Tracker. Buttons include *Next* and *Previous* functions which allow the user to move up and down the record list.

Checkbox Set List

Checkbox set lists are fields which allow the user to tick or leave blank. A ticked checkbox may indicate a certain selection. For example, ticking the *Funder* checkbox set within the *Relationship Type* field would suggest that the organisation provides funding to Health Exchange.

Drop-down Menu

A drop-down menu is an area which allows users to select values or categories from a prescribed non-modifiable list.

Fields

Fields are text areas within the database which store and display information. Some are accessible to users, allowing them to enter and save information, whereas others are locked.

Footer

The footer is the final section of all Relationship Tracker layouts. On the main record page, the footer holds non-modifiable time and user record creation fields, as well as buttons used to create and delete records.

Header Section

The header is positioned at the top of all Relationship Tracker layouts and where the majority of user controls are situated. Titles describing the page's contents are also stored here.

In-depth View

In-depth views are page layouts which allow users to access additional fields from the tabbed portal. Fields within in-depth views provide bigger spaces in which to type and read information within.

Label

Labels are titles used to describe what information is and should be stored within the field it is nearest to.

Layout

Layouts are visual page designs within the Relationship Tracker, constructed of header, main body, and foot sections.

Main Body

The main body is a section of the Relationship Tracker's main record page. Within this section are address and contact fields, as well as tabbed portals.

Radio Button

Each field within the Relationship Tracker has been issued with a label. This is to help the user understand what the field is used for and what type of information should be entered.

Record Selection Text

The Record Selection Text field is positioned within the header section of the main organisation record page and informs users of what record they are currently viewing in relation to the total number of records. It is particularly useful when searching for or filtering records, informing the user of how many records are available.

Tabbed portal

The tabbed portal is used to display additional information in a table row format related to the main record.